BEAUFORT COUNTY LIBRARY

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SC Lends (Version 1.4)

Issue 0.4

Circulation Training Guide

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Chapter 1 Circulation Training Overview

The Beaufort County Library Circulation Training guide is designed to provide a basic understanding of the Evergreen Circulation software capabilities, and a navigation overview of the Evergreen client.

The main goals of a library's circulation department are to charge out material to registered users and to receive and process returned material. Since record keeping plays an important role in every aspect of circulation, constant updating of the records is necessary. The Evergreen Circulation module manages customers, items, charges, holds, and billing information.

This training guide explains how to navigate and use the Evergreen Circulation software.

Evergreen Overview

Evergreen, the open-source software developed by the Georgia Public Library Service, is the Beaufort County Library staff interface to the South Carolina Lends(which stands for South Carolina Library Evergreen Network Delivery System) system. It provides a single graphical client encompassing all areas of library operations.

Registering Workstation and First-time Login

The first time a staff user logs in from a particular workstation a log in screen will appear.

The Message in the *Workstation* section is an indication that the client software is not yet set up for use[1].

The following procedure will correct this condition. Once this procedure is completed, you can proceed directly to login to the staff client (page 11).

The initial login screen (Figure 1) will require that a *Hostname* be entered in the box provided in the *Server* section in the top left quadrant of the screen

[1] The Evergreen staff client must be assigned to a library and given a unique name before it will connect fully to the Evergreen server. The only restriction is that the workstation's name must be unique within the assigned library. These names appear in statistical reporting, and can also be handy when troubleshooting.

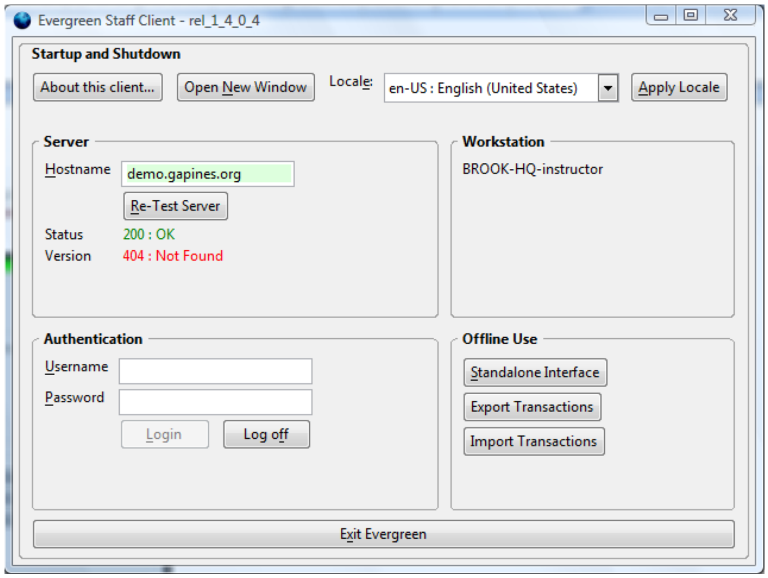


Figure 1 First time startup

Enter the hostname (URL) for your library in the box in the *Server* section in the top left quadrant of the screen (Figure 2). In the illustration below the hostname is *sctest.evergreencatalog.com* and press *Re-test Server.* You should see the *Status* and *Version* turn to *Ok*.

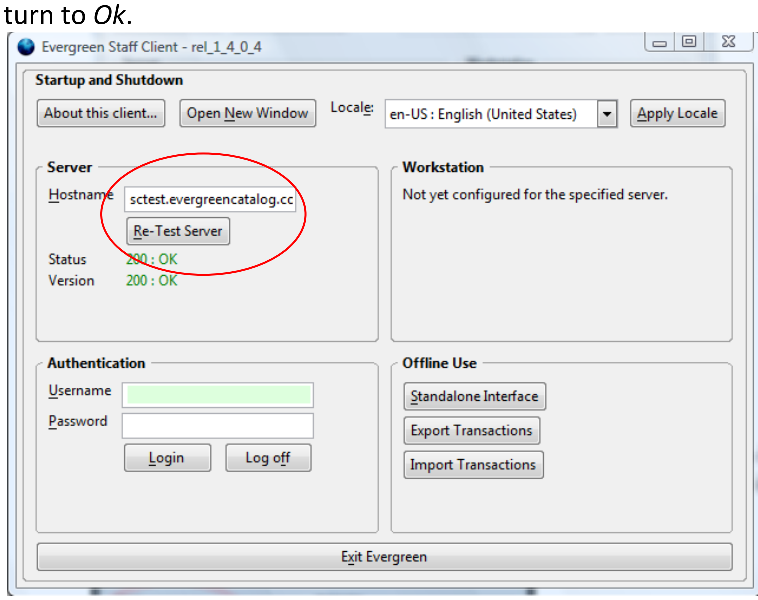


Figure 2 Entering a Host Name

Now log in by entering a *Username* and *Password* in the *Authentication* section located in the lower left quadrant of the screen (Figure 3) and press *Login*.

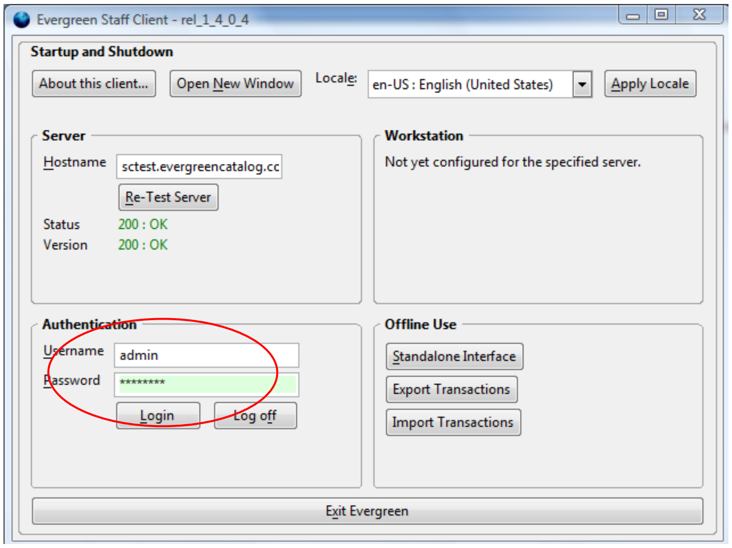


Figure 3 Entering a User Name and Password

You will be prompted to enter a workstation name and library to register the client. Type in the name for the workstation that has been assigned by your systems administrator (it must be unique). Next choose the library from the drop-down menu beneath the name slot. Once you have selected the library, click on the Register button to the right.

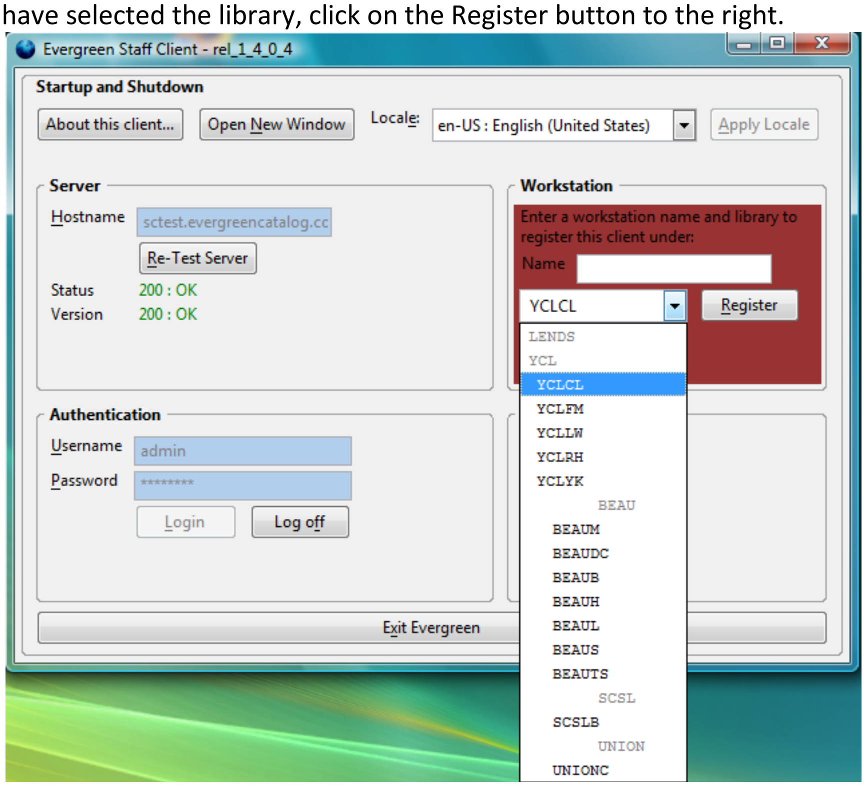


Figure 4 Entering a Workstation Name

A dialog box should appear with the message "Registration successful." Click on the *OK* button.

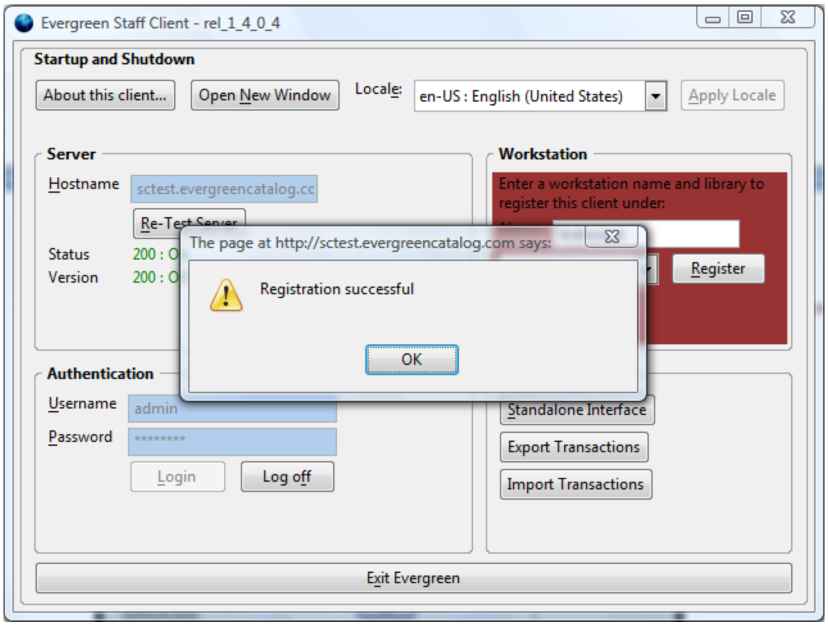


Figure 5 Sucessful Registration

The screen will reappear with the name of the workstation in the *Workstation* section in the upper right quadrant of the screen.

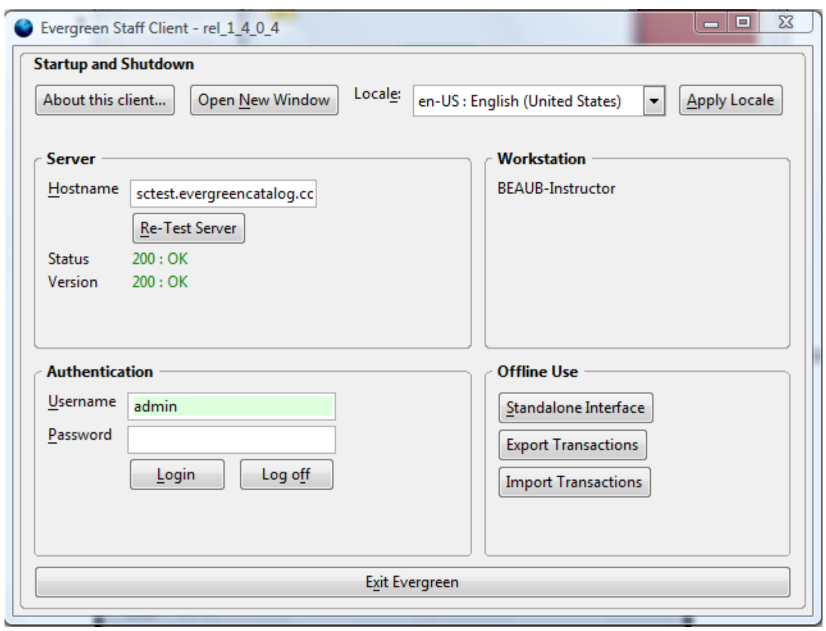
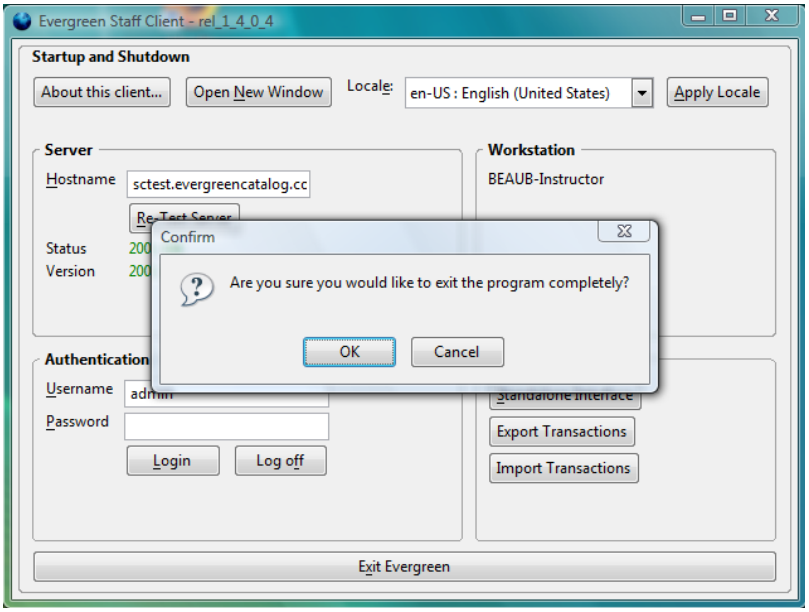


Figure 6 Client Registered & Ready to Login

After the workstation has been set up and named, it will be necessary to log in again. Remember that you log in twice for this procedure.

Click on the *Exit Evergreen* command button at the bottom of the screen to exit the system.

A dialog box with the message, “Are sure you want to exit the program completely?” appears. Click on the *OK* button to exit.



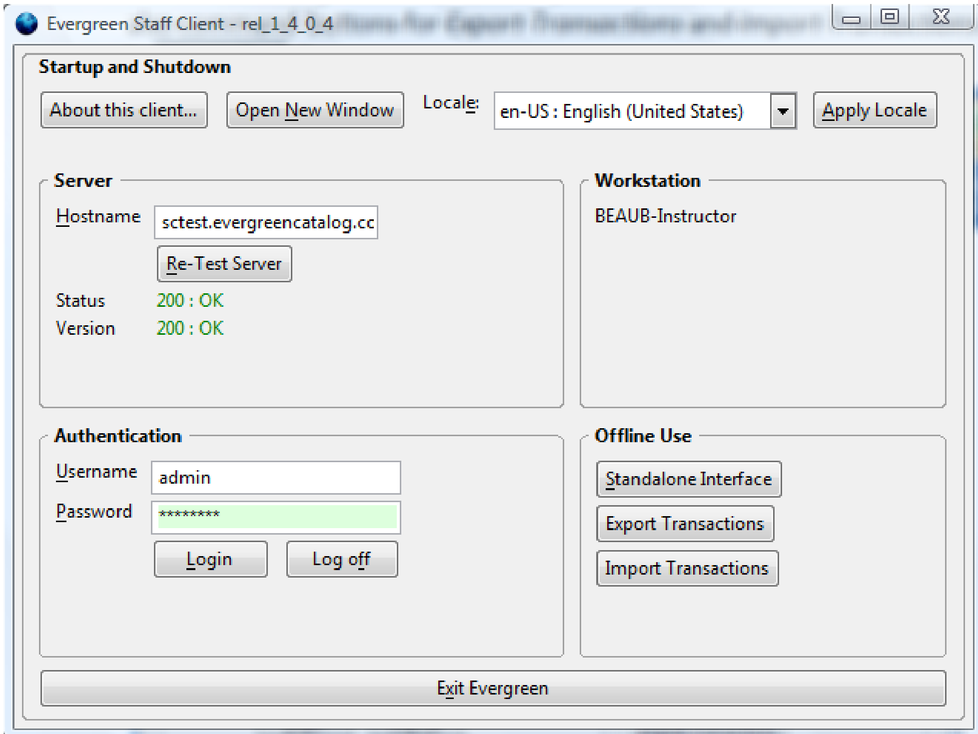
Now reenter the system by logging in with your username and password. The workstation will open a default Evergreen window and the application is now ready for use.

The *Offline Use* section is in the lower right quadrant of the screen. This provides access to the *Standalone Interface* control button, which can be used when the system goes offline. There are also command buttons for *Export Transactions* and *Import Transactions*. These will be explained in Appendix 4.

Log on to the Staff Client

Click on the Evergreen staff client icon located on the desktop

A login screen appears:



Type in the staff client user name – for example, bluffton-c1a
Type in the staff client password and press Enter.
The login screen will change to indicate that the software is **Loading Data** similar to Figure 7.

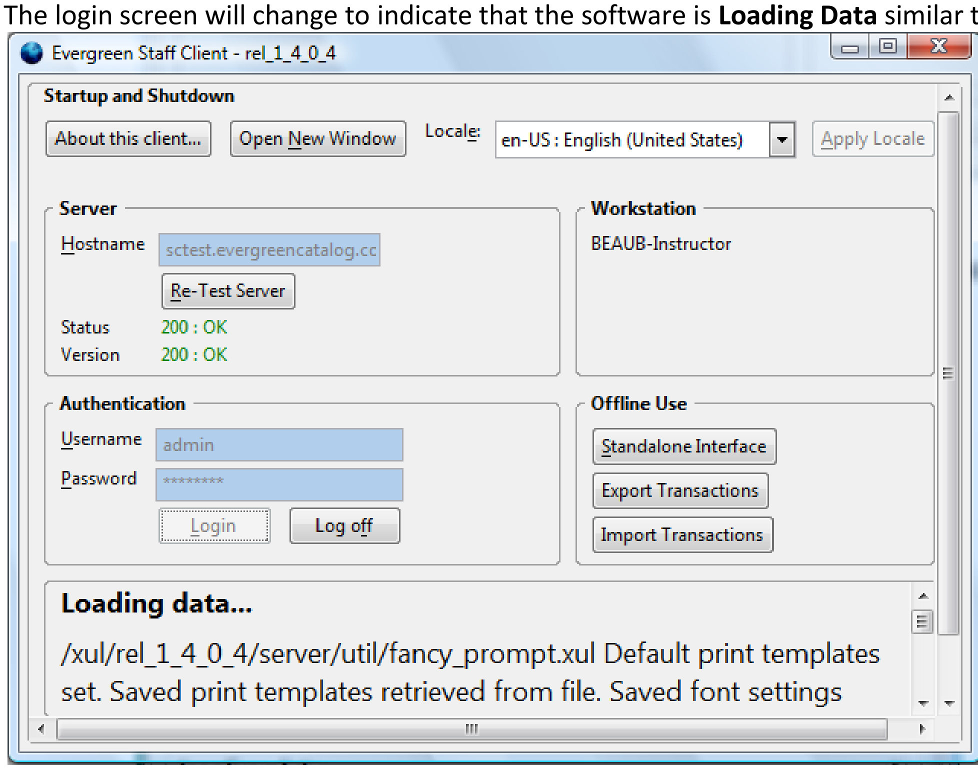
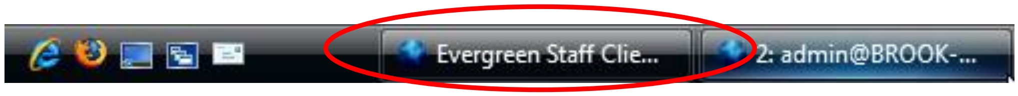


Figure 7 Evergreen Startup Loading Data . . .

This screen will be replaced with a default Evergreen client window as shown in Figure 9. The login screen will appear as an icon on your desktop Taskbar. If you click on the Taskbar Icon the login window will be redisplayed.



Use the *Open New Window* command button (as shown in Figure 7) to open more than one Evergreen window. This feature is also accessible from the **File Menu > New Window** command or **Ctrl+N**.

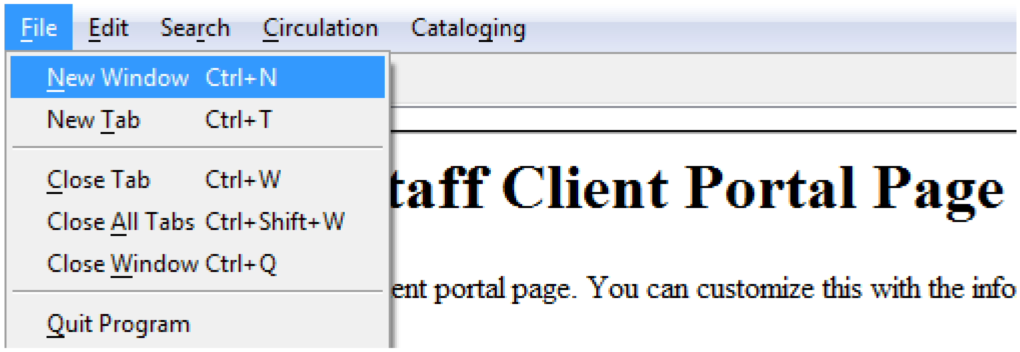


Figure 8 New Window Command from Evergreen's Menu bar

Do not confuse the use of multiple windows with tabs. Multiple tabs (up to nine) can be opened in any window. Multiple windows are helpful for multitasking operations where it is important to maintain distinct operations focus in a separate window. Each Evergreen window will operate independently of one other, which is a distinct advantage in cases where CIRC staff want to maintain separate windows, for example to record generic Internet printing bills, conduct, catalog search, check in, check out etc.

When several Evergreen windows are open on the desktop, the icons for the open windows are displayed on the Taskbar. You can switch between the open windows using ALT-TAB, or using mouse selection. The ALT-TAB key combination pops open a little window with the running applications represented as icons. By pressing ALT-TAB repeatedly, you can cycle between the open windows.

Evergreen Window – A quick tour of the “Cockpit”

As with all MS Windows programs, the most common way to start Evergreen is from the icon on the desktop. Evergreen can also be started from the Windows Start Menu by selecting **Programs > Evergreen**. The look of the program window (Figure 9) is similar to current web browsers that use a “tabbed” interface. Tabs allow you to have several pages (tabs) open at the same time in a single window. This is easier to manage on your computer screen than multiple windows, since you can easily switch between tabs in the same window using the pc’s mouse to select the needed page.

> Note: Evergreen will open a Maximum of nine tabs; however, it is best to open less than nine so that operations you perform, at the workstation, which require a new Tab will be able to open an additional Tab. To avoid resource problems, limit your open Tabs to five or six simultaneously open tabs.

The tabs appear below the menu bar in Evergreen with a descriptive title. Simply select a tab to bring it to the front and view the page displayed in the tab. You can use tabs to have access to multiple things all at the same time: customer records and searches, bibliographic records and searches, circulation or cataloging interfaces–anything at all in Evergreen.

Caution is advised, however, when selecting a menu choice, because the selected feature will replace all information that is currently in the active tab.

- Create a new tab by pressing **Ctrl+T** on the keyboard or selecting **File > New Tab** from the menu.
- Close a tab by pressing **Ctrl+W** on the keyboard or selecting **File > Close Tab** from the menu.
  Caution-- Accidentally pressing **Ctrl+Q** instead of **Ctrl+W** when trying to close a tab, closes all tabs and the active window leaving just the Startup/Shutdown portion of the client running.
- Switch tabs by pressing **Ctrl+Tab** on the keyboard or selecting the tab in the tab bar.

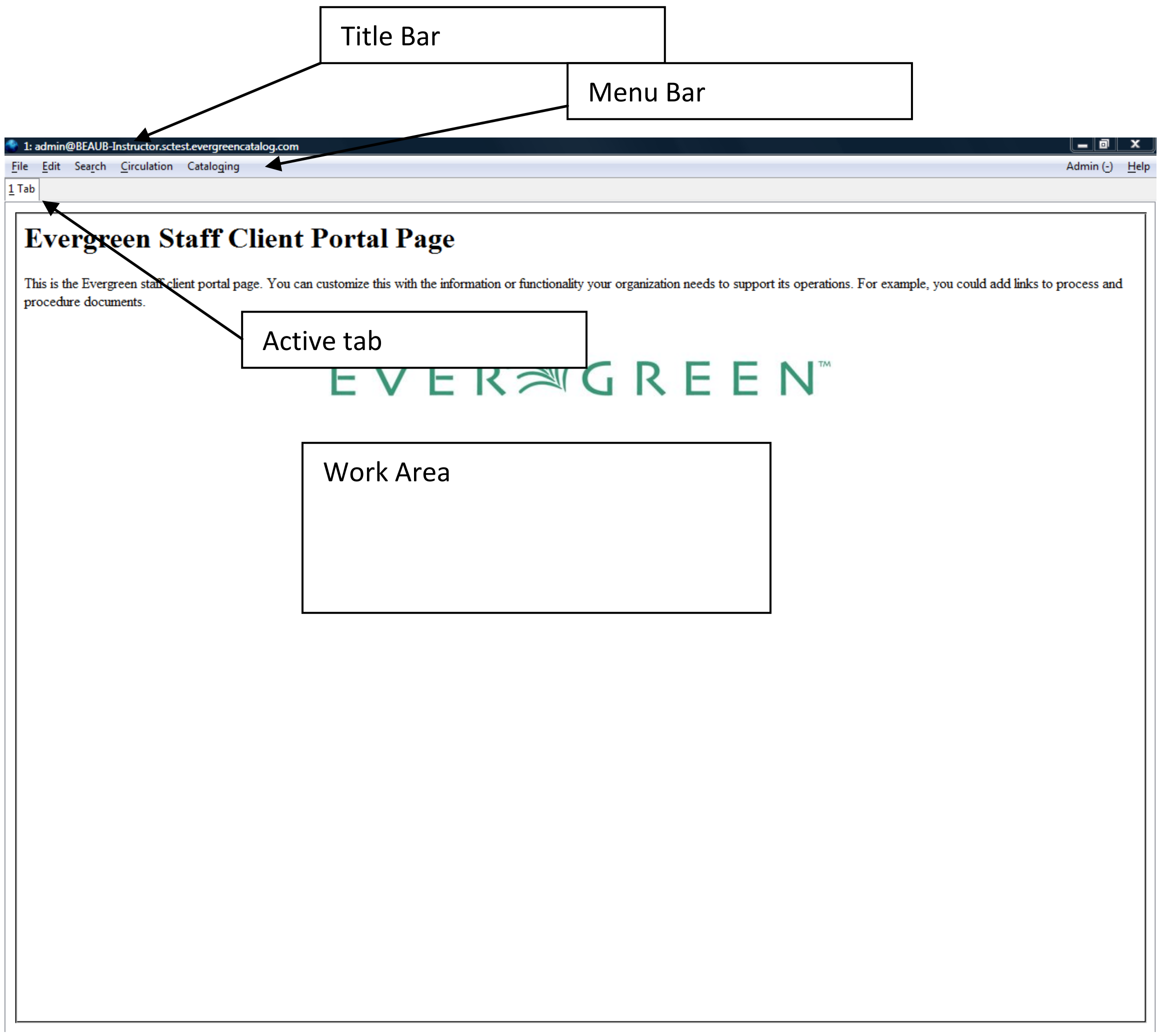


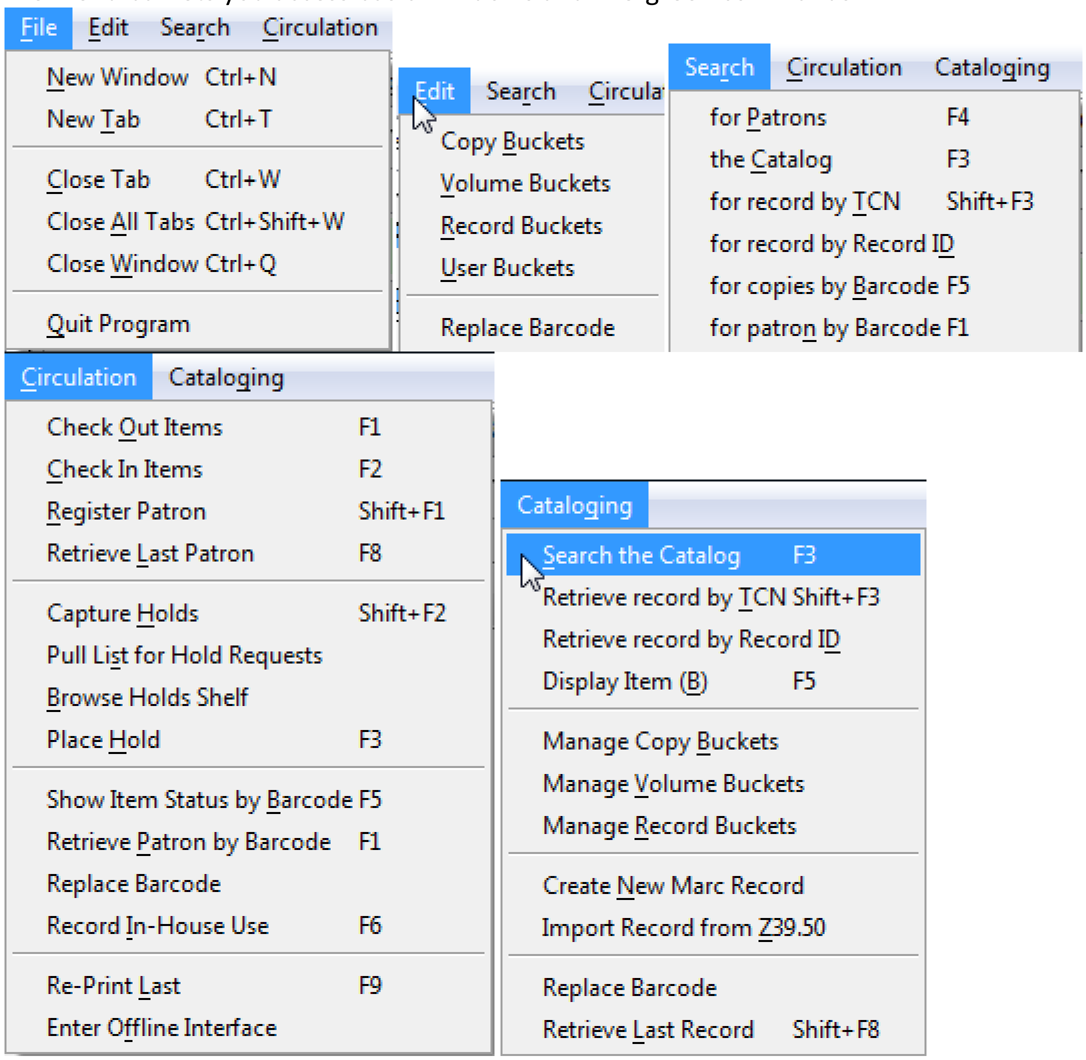
Figure 9 Default Evergreen Client Window

The Title Bar

On the left the title bar displays the User login and server name and, at the right end of the title bar, are the three familiar Windows control gadgets  that have the same function in all MS Windows programs. You can temporarily hide the Evergreen window by clicking the Minimize button, adjust the size of the window with the restore Down/Maximize button, or quit Evergreen with the Close button. It is recommended that Evergreen windows be maintained in maximized mode because most features utilize the full screen real-estate.

Menu Bar

The menu bar lets you access basic Windows and Evergreen commands.



Split Window Pane Management

Many Evergreen windows are split into multiple panes (Figure 10 has three splits left and center—divided in two).

The split panes are easily identified by the borders dividing the splits. To adjust the size of a split move your mouse to the dividing line and when the mouse curser becomes a doubled headed arrow click and drag to adjust the split area.

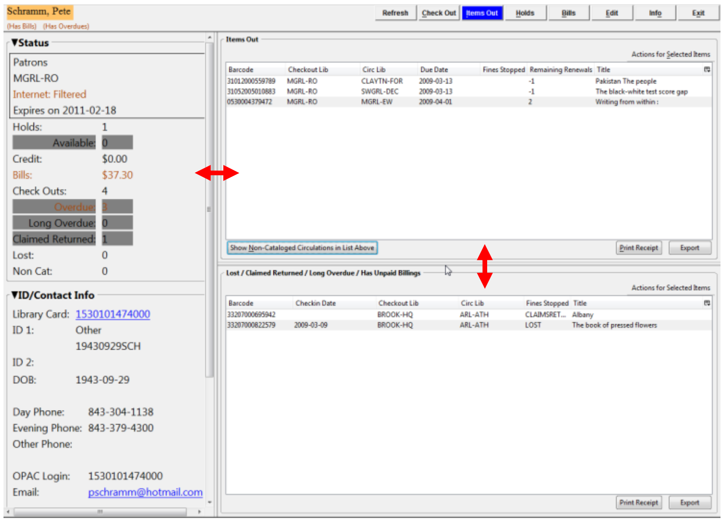


Figure 10 Split pane example

Dialog Boxes

When Evergreen interacts with you - that is, when it has a question to ask, when it needs more information to complete a task, or when it presents information you may have asked for - it usually puts a *dialog box* on the screen. A dialog box is nothing more or less than a window that requires your attention and, perhaps, input.

Figure 11shows a dialog box which illustrates how some of the various standard Evergreen components can be used to extract information.

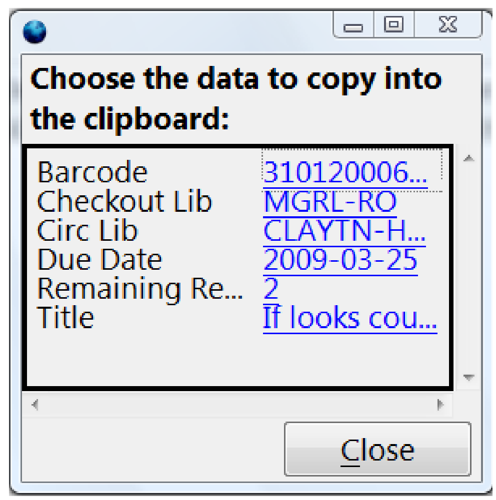


Figure 11 Dialog box

Each part of the window has a name:

- **Title:** A dialog box's *title* will sometimes appear at the top of the dialog box, but the title rarely appears in your PC's Windows taskbar. This is one of the ways that a dialog box is different from a garden-variety window. You can usually go directly to a window by clicking in the taskbar – something you can't do with dialog boxes. To find a lost dialog box, you frequently have to hunt around.

Various controls appear on dialog boxes. Windows comes with many controls, and most of the controls are drawn from the standard control toolbox. Standard controls are a benefit because they work the same way, all the time, no matter where you are in Evergreen.

- **The X (Close) button:** The X button almost always appears on a dialog box, as well as the other two buttons that you often see on a regular window - Restore and Minimize. Clicking the X button almost always makes the dialog box go away.
- **Drop-down lists:** These lists come in two different flavors. With one kind, you're limited to the choices that appear in the drop-down list--If the item you want is in the list, you just pick it. The other kind of drop-down list lets you type in whatever you want if your choice doesn't appear in the list.
- **Command buttons:** These buttons tell the dialog box that you are ready for it to complete your task. Click a command button (e.g., *Close*), and the dialog box does something. Some Command buttons will appear against a gray background indicating

that the button is not yet active. You may have to enter information into the dialog box before it becomes active.

Usually it's pretty obvious when you can change things in a dialog box. Text that can't be changed generally appears against the window's background; whereas, text that can be changed frequently appears on a white background in a text box.

Check boxes: *Check boxes* let you say "yes" or "no," independently, to one or more choices. If you see a group of check boxes, you can pick one or none or all of them. Option buttons, on the other hand, only let you choose one out of a group - no more, no less.

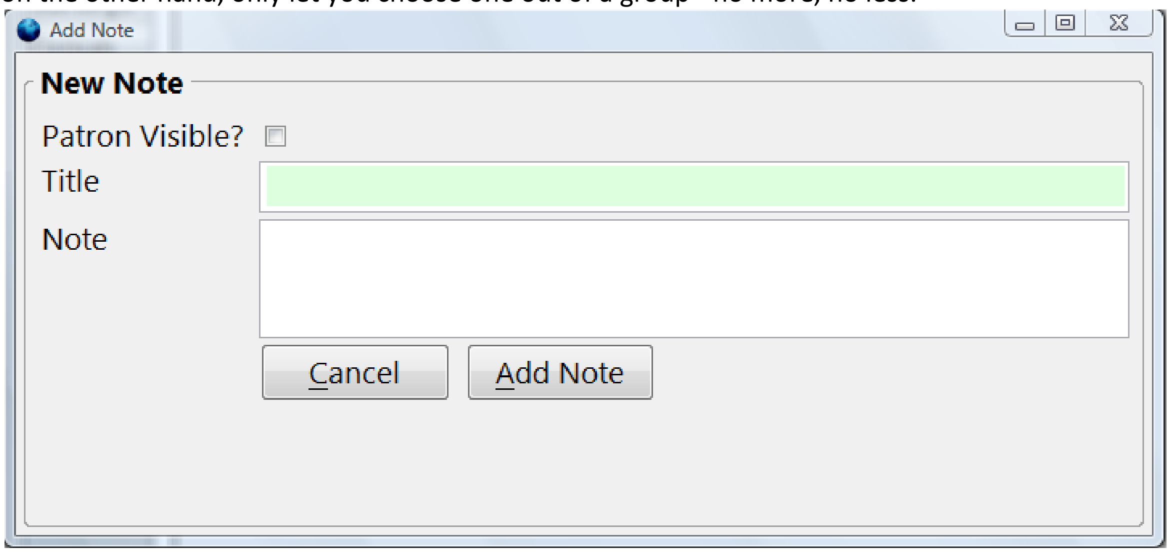


Figure 12 Check Box Example

Option buttons: Option buttons (also called *radio buttons)* act like the buttons on a radio -- Push one, and a station plays; push a different button, and a different station replaces the other. You can't have two different buttons selected at the same time.

Figure 13 shows a dialog box that contains a table of information along with column headings – much like an Excel spreadsheet. On this window, you can review information and sort items in the list in ascending or descending order. To do this, simply click the column heading of the column you want to sort. Drag columns by their column heading into the order which works best for you.

You can also adjust the width of the columns by positioning your mouse pointer between column headings and dragging the mouse left or right. Wait till your mouse pointer becomes a double headed arrow ↔ before holding down the left mouse button and dragging the mouse in the desired direction. The small icon to the right of the column heading titles (Figure 13)--called the Column Manager), when selected, reveals a list of alternative column headings. Current heading will display a check next to their name. Use your mouse to modify the list of displayed headings.

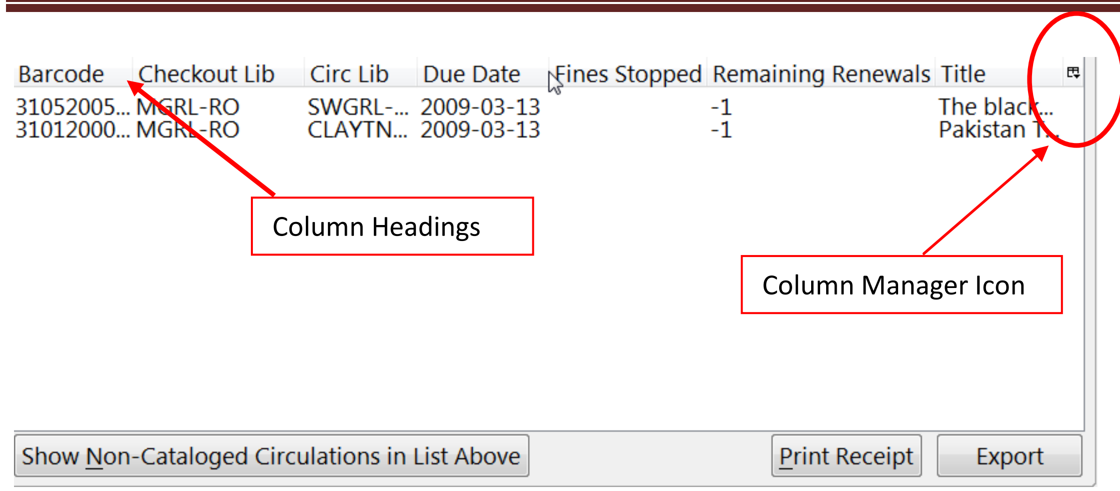
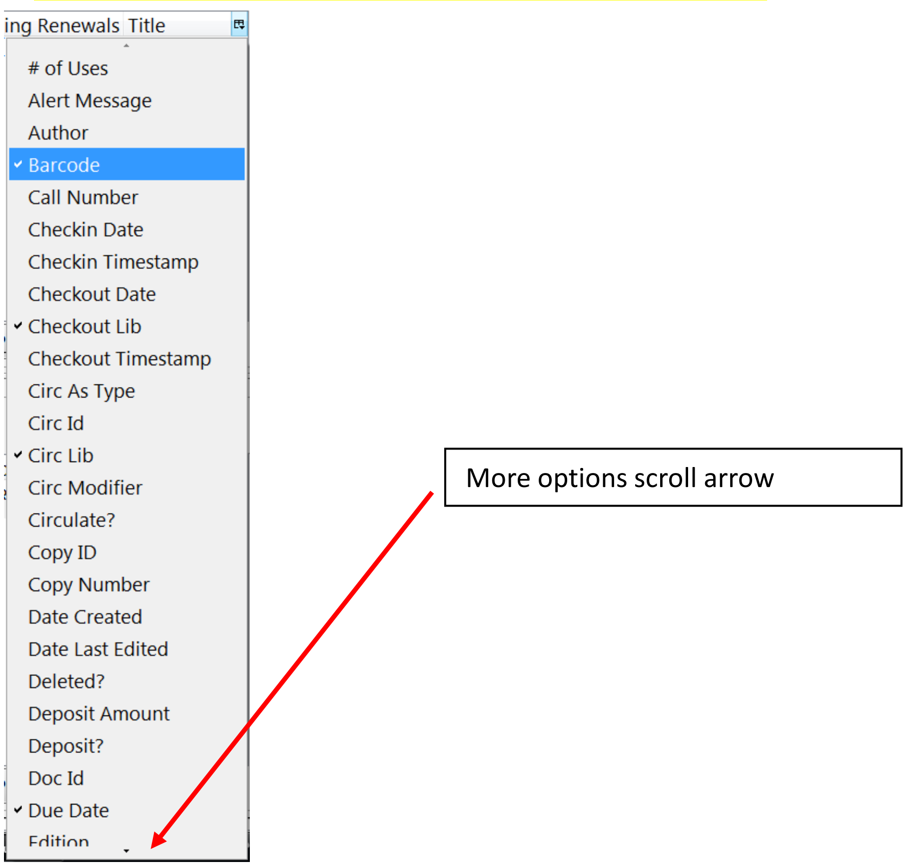


Figure 13 Excel-like column features

If you wish to reuse the column heading changes you have made, save your changes through ***Actions for Selected Holds/Items >Save Columns***. This saves column order, column width, and column visibility in the local workstation memory. This save will affect all workstation users until a new Save is executed.

The *restore defaults* option at the bottom of the column manager only restores the column order; it does not restore the column to a "default" selection.



Additional Information Buttons

Gadget – These tools make selecting field values easier. Figure 14 shows an example of the date gadget in use for setting a customer's birth date for part of the registration process. Use gadgets to select information such as date/time ranges. Always click an available gadget to ensure you enter the information in the correct format.

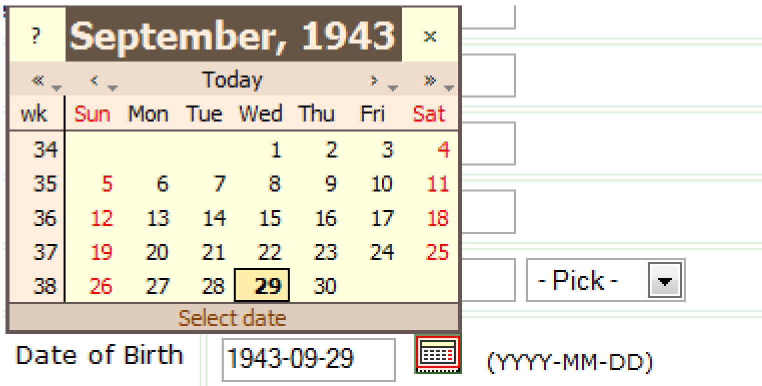


Figure 14 Calendar Gadget

Tool Tips – Tool Tips display in a box below the cursor when you hold the mouse over some items. For example Figure 15 shows, the limited column width on the *Items Out* window prevents a full view of the text. Evergreen, in this case, displays ellipsis points (. . .) to indicate that there is omitted material from the column text and displays a tool tip with the entire text entry.

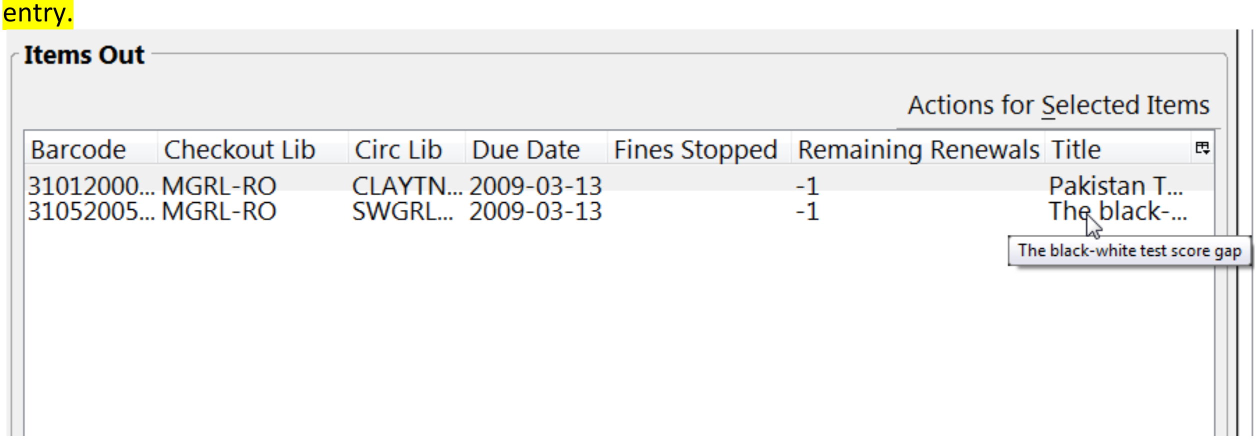


Figure 15 Example Tool Tip

Navigation Toolbar – The *navigation* toolbar (Figure 16) is frequently used when reviewing customer records. It appears on the top right side of a customer record window.

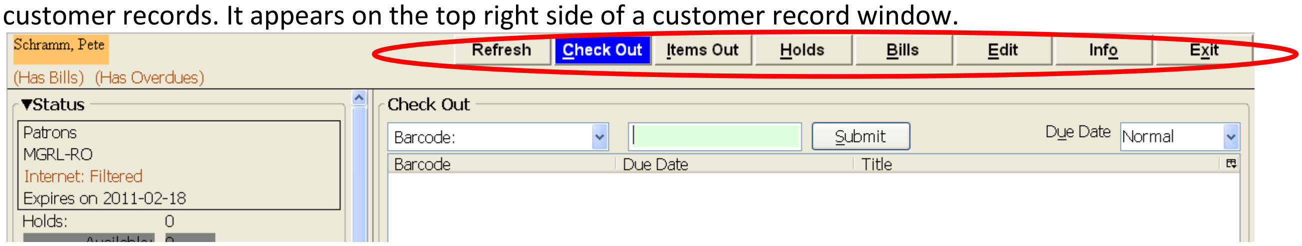
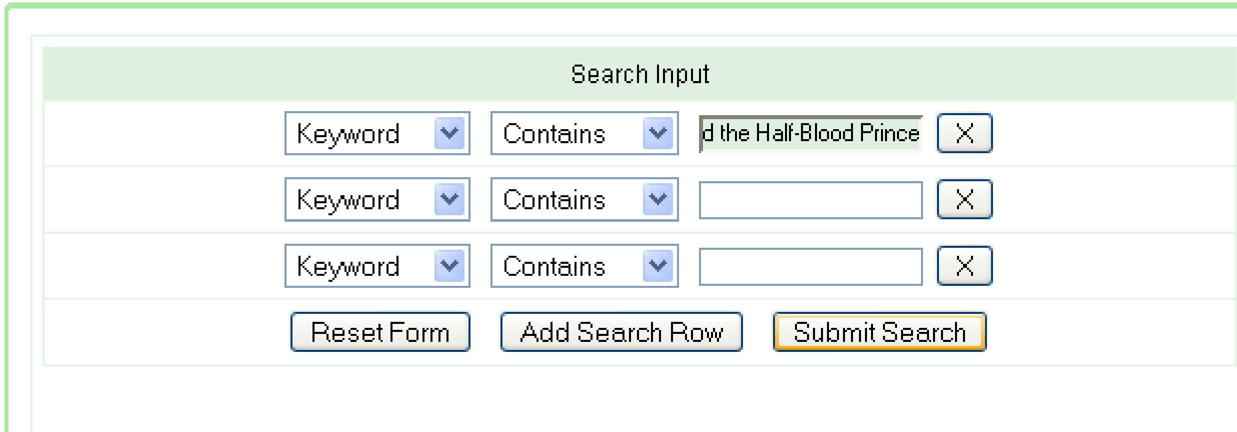


Figure 16 Navigation Toolbar

Clipboard Support

Pasting – Evergreen input dialog boxes all support the Windows clipboard paste. For example, using the copy command **Ctrl+C** to select a title from any location, the following figure shows the title being pasted into a search box by selecting the box and pressing **Ctrl+V.**



Only one clipboard location exists, hence another cut or copy operation overwrites the previously stored information. The last item copied is pasted in a following paste sequence. **Copying** – Copying information to the clipboard is dependent on the particular Evergreen screen and the location of information within the screen. For example anywhere information can be pasted it can also be copied or cut (**Ctrl+X**). A more restrictive example is shown in Figure 17 where only the items in Blue and underlined can be copied to the clipboard. The copy operation requires that you click the item with your left mouse button. A confirmation dialog box will show a successful copy.

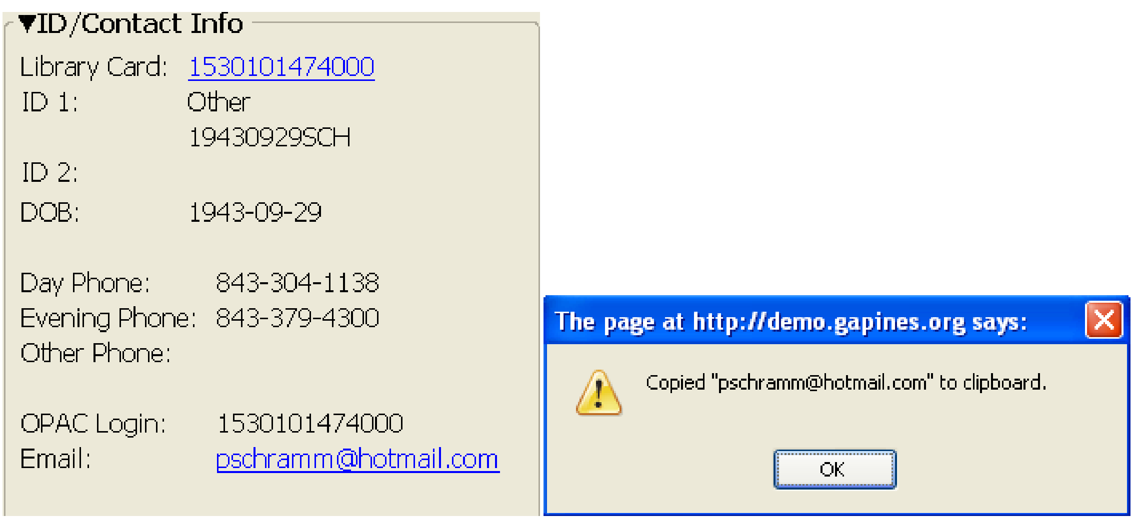


Figure 17 copy links

In another example Figure 18 shows that by right clicking the items checked out to a customer the information can be copied to the clipboard. Use either a right click with your mouse or select *Copy to Clipboard* from the *Actions for Selected Items* menu. Either action results in a dialog box (Figure 19) appearing where you must select from the list which item to be copied to the clipboard. Only the item you select from this dialog box is copied—the other items in this example were not copied.

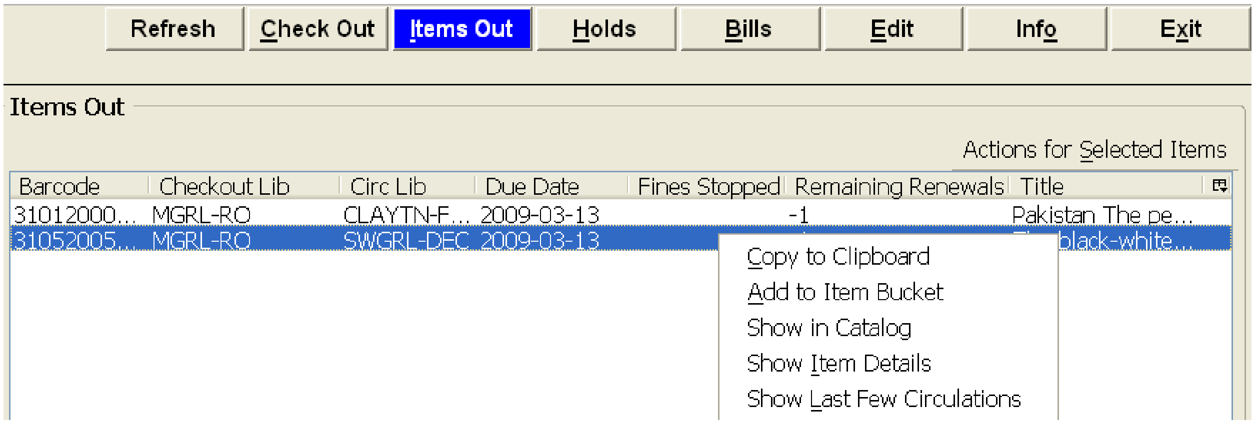
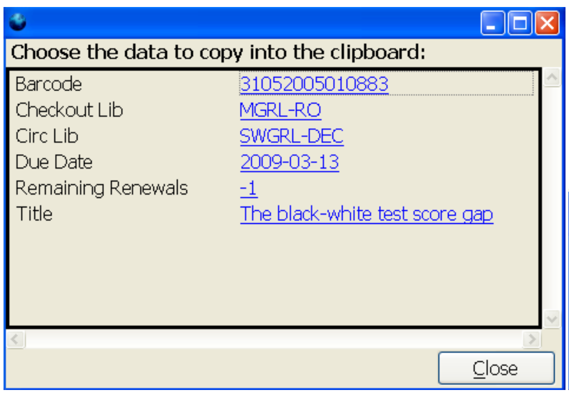


Figure 18 copy to Clipboard example



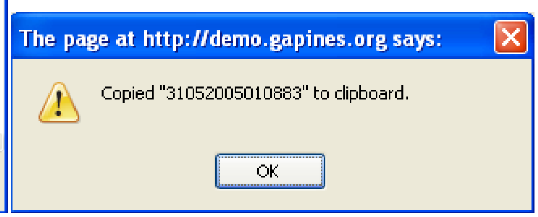


Figure 19 Choose what to be copied to the clipboard **Acknowledgment message**

General Evergreen Tips

MS Windows applications are designed to be used either with a mouse or the keyboard. Therefore, dialog boxes in Windows will have a default button that has the “active focus”. This is the dialog button that when the ENTER key is pressed, causes the default command to be carried out. This button is identified on a dialog box by its appearance. The visual clue is usually a raised appearance or a dashed box encircling the button.
Bar code scanners automatically generate an ENTER key stroke; therefore in most Evergreen windows, a scan will activate the active button (e.g. *Submit*) which causing the active window to close. The corollary to the scanner ENTER is a similar concern to ENTER keystrokes. It has the same effect on open Windows where the default command button will automatically respond to an ENTER keystroke.

Evergreen Definitions

This section provides definitions for commonly used Evergreen terms used throughout this guide.

Circulation Terms

Brief Title —A Brief Title enables the library to circulate a book not fully cataloged e.g., ILL materials. This feature creates a temporary record so an item can circulate. When discharged, the item can be routed so a full record can replace the brief record, and remove the brief item record from the system.

Hold —A Hold is a need for materials not currently available in a branch. Evergreen offers options for tailoring Holds to fit specific needs.
Hold Stalling—the Hold Stalling feature will first look to see if the item is available in the local library. If the item is not available locally, it will look to other branches to see if a copy is available. A pull hold request will be placed on the found copy; however, if a copy is returned to the local branch before the hold is pulled, Evergreen will trap the hold as it is returned to the local branch.
ICL —Intra-consortial Loan requests among SC Lends member libraries.
ILL—Interlibrary loans for material outside of Beaufort County Library and SC Lends member libraries.
In Transit —This term applies to sending and receiving materials between branch libraries.
Request —A Request is a message sent between library staff and library customers. Requests include interlibrary-loan requests, recommendations for purchase, questions or comments to library staff, or messages to customers.
Shadow Catalog —The shadow catalog contains records searchable only by library staff. For example, you might want to hide or "shadow" records from customers, such as lost or missing items or items still being cataloged. Customers at OPAC workstations can search and display items only from the standard catalog. Staff at Evergreen workstations may search and display items in the standard catalog, the shadow catalog, or both.
Customer—User records represent not only customers, but also the library entities. Departments and staff members of the library are entered into Evergreen as users, with privileges defined for each type of user, e.g., ILL department, or Repair. A user may also be a status or condition assigned to an item e.g., DISCARDS.

Chapter 2 User Information and Maintenance

Overview

User records represent not only customers, but also the library. Some departments may have their own customer barcodes and are entered into Evergreen as users, with privileges defined for each type of user. Examples include repair, or money, etc. A user may also be a status or condition assigned to an item (e.g., DISCARD).
Each library customer must have a unique 13 digit identification number called the user ID. The user ID is the barcode number provided on Beaufort County Library cards – the barcode and printed number match. The use of the barcode, as entry vehicle for user IDs, is both quick and error free. Scanned User IDs are used to check out materials, place holds and create bills.
When registering a user, you can enter the user's alternative user ID (alt ID). The alt ID is the user's birth date followed by the first three initials of their last name[2]. The alt ID, along with the user's name, provides additional access to the user's record when the barcode number is not available.
To maintain consistency, follow the conventions (e.g., mixed case entries for customer names) defined by Beaufort County Library policy when entering information in the user record.

Identifying the source of Notes, and Alerts

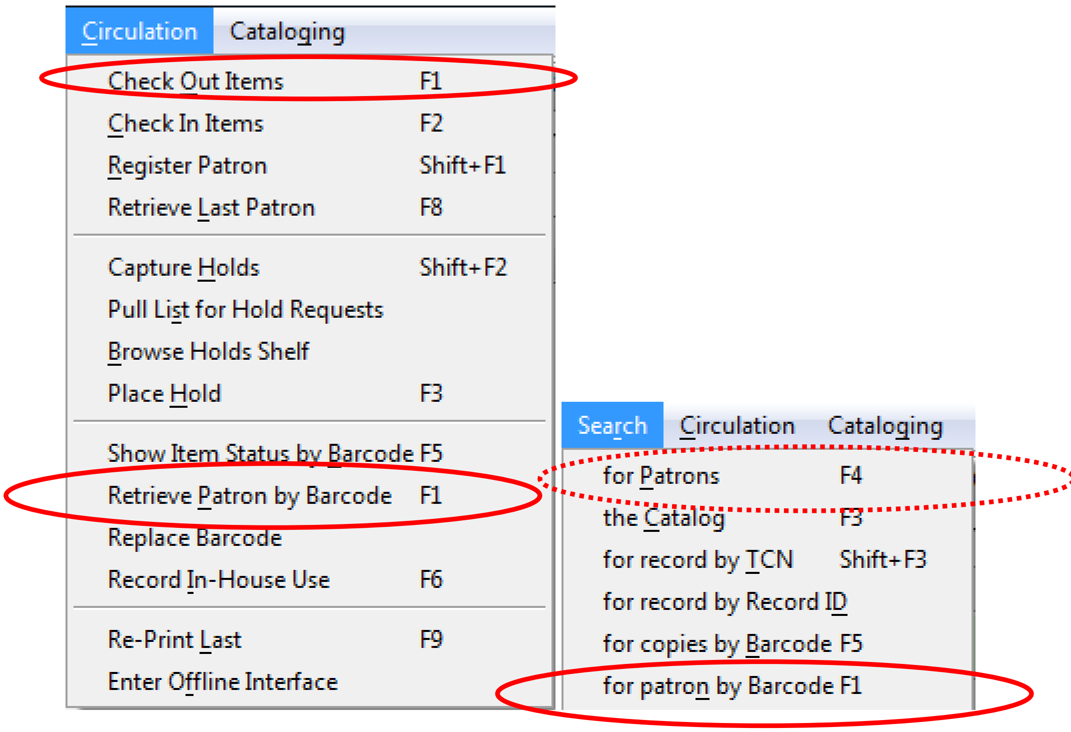
Any note or alert message created by staff should include the Entry Date, system initials, branch initials, and staff initials. For example, Missing CD in "Harry Potter and the sorcerer's stone" barcode # 0530003204178, Case is on repair shelf. Customer called. 2009-04-27, BCL, BLU, ps.
Valid branch codes for the Beaufort County Library (BCL) are the following:

- Beaufort BEA
- Bluffton BLU
- Hilton Head Island HHI
- Lobeco LOB
- St Helena STH

Access to Customer Features

The *Circulation* and *Search* menu bar labels provide access to creating, searching and maintaining customer records. Notice that pressing the F1 function key on your keyboard, or selecting any of the following menu items (***Circulation > Check out Items***), (***Circulation> Retrieve Patron by Barcode***), or (***Search > for patron by Barcode***) all take you to the same Evergreen screen.

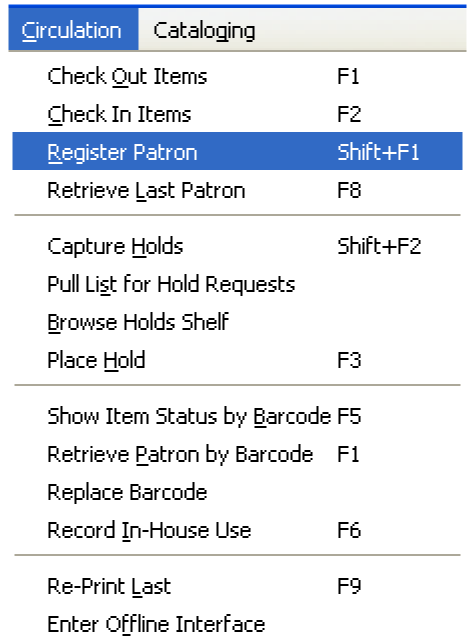
[2] Previous library policy called for the use of Social Security numbers for use as the Alt ID. Older customer records may still reflect SS numbers. The current Alt ID format should be used to replace SS numbers whenever encountered by library staff.



Registering a Customer

The process of registering a new customer begins with the customer furnishing proof of residency, and completing the library application. Once the customer has completed their application, Evergreen *Customer Registration* guides you through the process of creating a new user record. Customers, however, may be unaware that they are part of a consortium and that their current library card will work at your library. Searching for existing customer records will become more important as SC LENDS grows to include more libraries. Thus, in order to prevent customer card duplication proceed to registration only after searching to determine if the prospective applicant has ever had a card in SC LENDS. First search by ALT ID then search by name. You can use a combined search to find customers by first name, last name, postal code, address, etc. You can truncate search terms for more search results (e.g. schramm truncated to sch will retrieve a list of all customer records beginning with sch.).
In the case of a Lost Card, go directly to the Lost Card Procedures detailed starting on page 51. As you begin the keyboard input please note that all text entries should use mixed case for names, street addresses, etc. (e.g., John Doe, 120 Palmetto Way, Bluffton, SC). The use of all upper case entries is restricted to items like Alt ID letters, state and street abbreviations (e.g., DR, CIR), common suffix entries (e.g., MD) etc.

Press Shift + F1 or select ***Circulation > Register Patron***



On the left side of the screen (Figure 20) are links to the various sections of the customer record. Each link will be highlighted as its section is active. Registration begins with the user identification section. (Section 1) Fill in required information (red fields) section-by-section as you move through registration using the navigation bar on the left or by clicking on the *Forward* link at bottom right of screen. The colored fields must be filled in to complete the customer record. If any of these fields are not filled in, or the values entered are wrong, the system will indicate those empty or invalid fields with color.

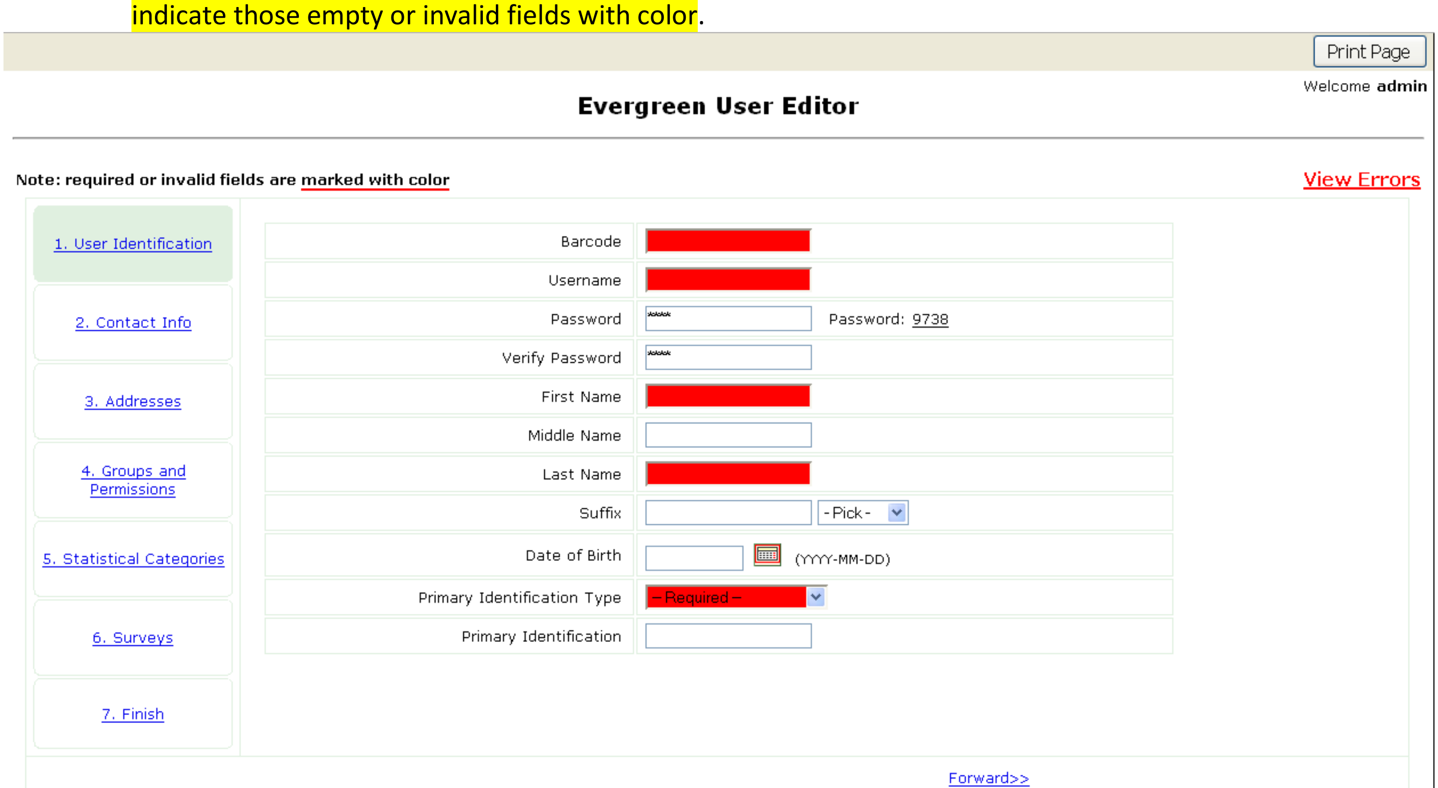


Figure 20 Opening Window for Registering a Customer

User Identification (Section 1)

Note: As you enter a new customer registration the system checks for possible duplicates in the following fields: name (first and last must match), Email address, and primary Identification field. If evergreen finds a match it will alert you with a message for a possible duplicate card. However, the system will allow you to complete a registration even in cases where the match has been identified.

a. *Barcode*–Scan a new card. (Duplicate barcodes are flagged immediately.)

b. *Username* – After entering the barcode, the *Username* field will be automatically populated with the barcode. To login to the OPAC the customer will need the username created at this step. If the customer has an alternate username they would prefer to use, the field can be changed by the circulation staff (or later on by the customer when they login to the OPAC--See Appendix 3). In most cases it will remain the barcode. *(automatic)*

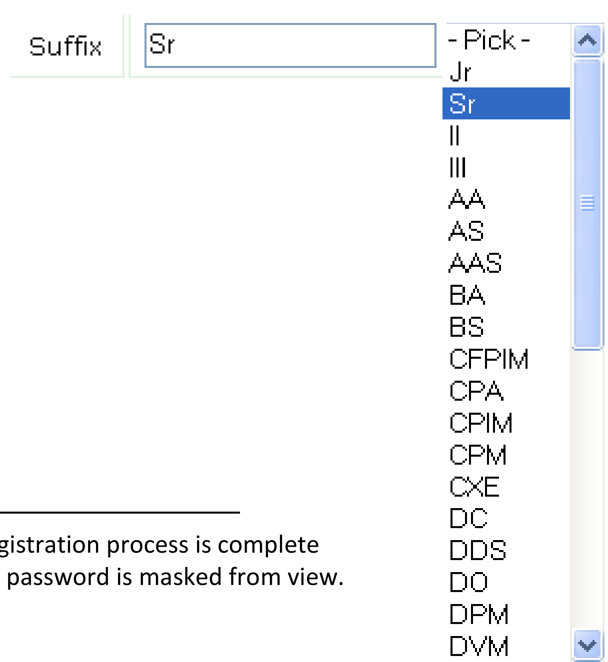
c. *Password* – Evergreen automatically generates a "temporary" four-digit password displayed to the right of the password box. This field does not need to be changed unless the customer wishes an alternate password. It is recommended that the customer be given an instruction sheet with their username, temporary password, and the URL for the library catalog.
The first time a customer uses their username to login to the OPAC they are prompted to change their password to something with at least seven digits and must include at least one letter and at least one number. If the customer forgets this temporary password[3] before logging in, you can, upon request, regenerate a new one by editing the customer's account.
Both username and password are case-sensitive. *(automatic)*

d. *First Name –(required)*

e. *Middle Name*– This is a required field entry. If the customer does not furnish a middle name enter *NMN* (i.e., No Middle Name) in its place.

f. *Last Name–(required)* (Duplicate first and last names are flagged immediately.)

g. *Suffix* – For names with suffixes. Use the dropdown box to the right of the Suffix field to select from a list of standard suffix abbreviations. *(optional)*



[3] Once the registration process is complete the customer password is masked from view.

h. *Date of Birth – (required)* Notice that the format for entering the date is 4-digit year, 2-digit month and 2 digit days. Use a dash to separate the dates. If the customer does not wish to give their birth-year, enter 9999 in its place. If the customer does not provide their birth-date then leave this field entirely blank. A

gadget is available for entering the dates from a calendar. From the calendar double click the left mouse button to enter a date.
Birth dates for children under the age of 18 will result in a new parent or guardian entry field appearing below the Primary ID field. Notice, that when present, the *Parent /Guardian* field is also a required field (shown in red). Format for this field is "first name last name" – in the normal mixed case manner (e.g., Peter Smith).

i. *Primary identification type* – Select one of the types from the drop-down menu Use the drop down box to select *other*. Beaufort County Library will use **Alt ID.**

j. *Primary Identification* – Evergreen uses the information in this field (Figure 21) to search for a possible duplicate card. This search is automatically initiated after a customer entry is completed. The system will alert to a possible duplicate --if found[4].
The Alt ID entry is constructed from the customer's birth date (yyyymmdd) followed by the first three letters of their last name - 8 digits followed by three letters. The data is entered without dashes, slashes or spaces and the letters are capitalized, e.g., 19770821BEH. If the customer does not wish to give their birth year, put 9999 in its place. If the customer does not provide their birth date then leave the Alt ID field blank.
In the event of twins or duplicate Alt IDs from an unaffiliated customer, add (space) followed by the letter A, or B, C, etc. to the end of the Alt ID to make it unique, i.e., 19770821BEH A.

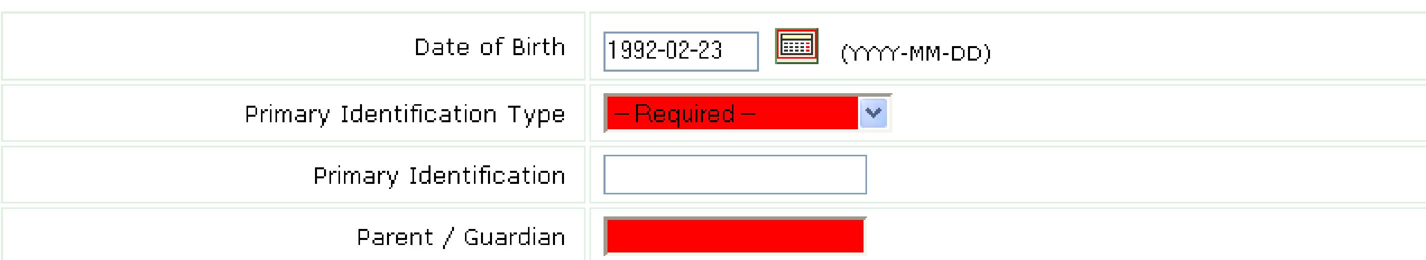


Figure 21 Primary Customer Identification

[4] Caution—Evergreen does not check for a duplicate Alt-ID when a customer record is **modified**. This should not be a problem so long as Staff recognizes that one or more duplicates may appear when customers records are searched using Alt-ID as the search parameter.

Contact Info (Section 2)

Enter the customer's email (required for notices and hold messages) and any available phone numbers. The home library will default to the library where the customer is registering. Referring to Figure 22, note that Evergreen will alert you at this point if the name you previously entered is a possible duplicate. Continue completing the customer registration once you have verified that this is not a duplicate card.

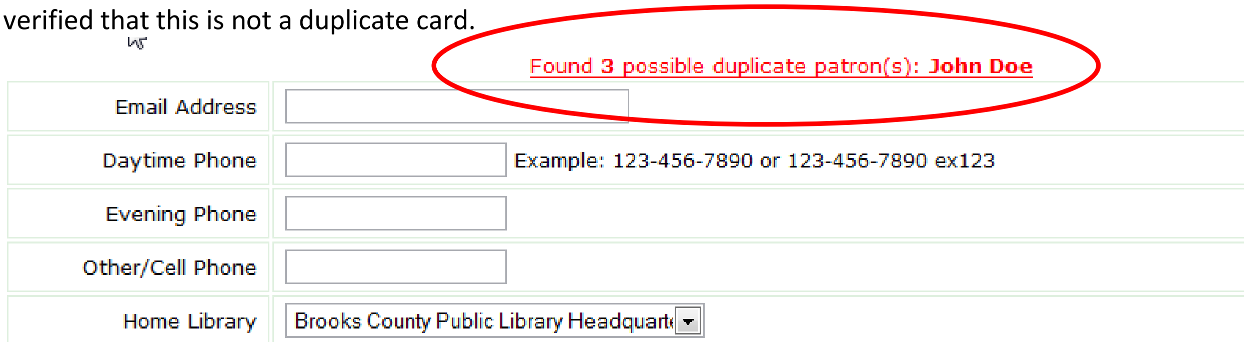


Figure 22 Duplicate name alert

The contact entries consist of the following:

a. Email Address—If the customer wants *e-mail* notices (e.g. Overdue Notices), be sure to type the customer's full e-mail address (in lower case Internet style e.g., psmith@hargray.com) in the *Email Address* box— *(optional)*
b. *Daytime Phone— (optional)*
c. *Evening Phone— (optional)*
d. *Other/Cell Phone— (optional)*
e. *Home Library*—the setting assigns the lending library associated with the user's card. This field is defaulted to your branch location. *(automatic)*

After completing all of the fields, click the *Forward>>* link to continue on to the customer's address information.

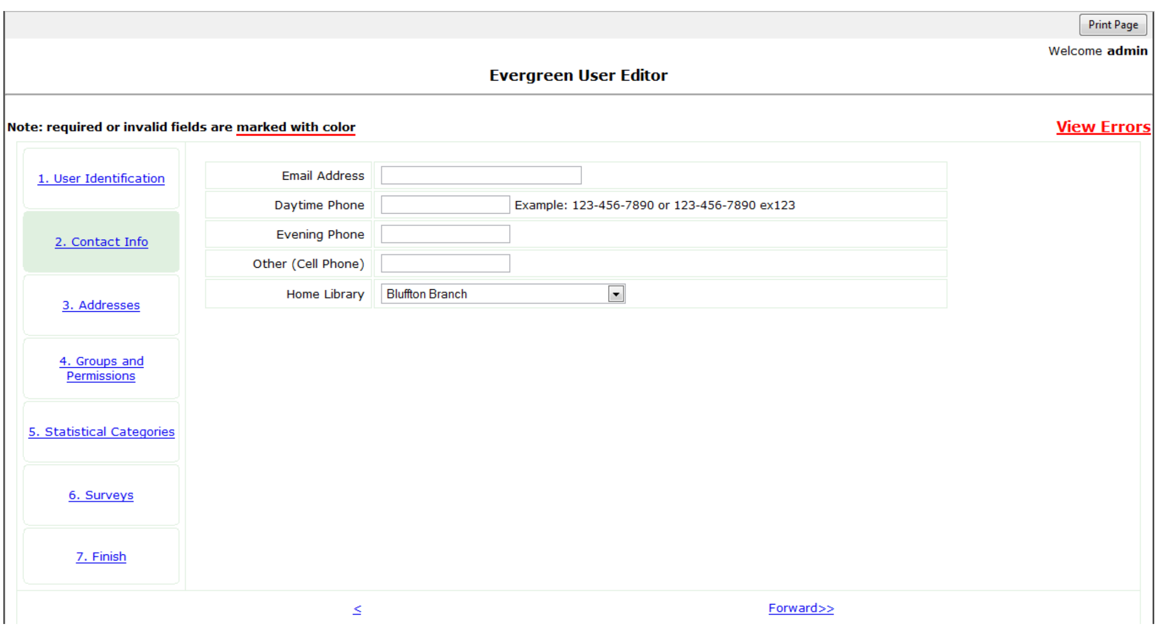


Figure 23 Contact Info Window

Addresses (Section 3)

From the "Addresses" screen enter the customer's address. A customer record can have multiple addresses.

To add multiple addresses click the *Create a New Address* command button.

a. *Label— (optional)* identifies what the address location represents (e.g., home, work, summer).
b. *Street* —can be physical (e.g., 23 Dory CT) or PO BOX in ALL CAPS. See Appendix A for USPS approved street abbreviations.
c. *City/State* —as shown in the example *with the state abbreviated (e.g., Beaufort, SC)* See Appendix B for approved state abbreviations.
d. *County* — Evergreen will default to the County of residence based on the customer Zip code. (*automatic*)
e. *Zip — five digit Zip codes are acceptable.*

The options to the right of the address boxes modify the entries. For example the first two check boxes:

1. *Within City Limits*— (not used)
2. *Valid*—Used to mark an address as valid or not. If the address needs to be updated, turn off the valid checkbox. Once this box is cleared the customer's record will display an invalid address alert when opened (Figure 24).

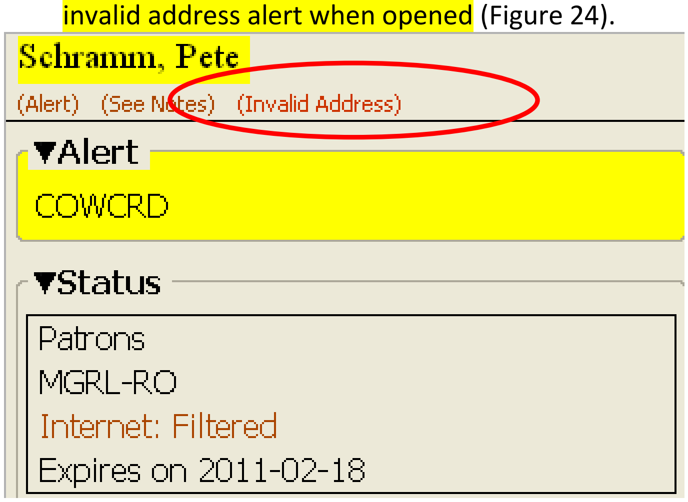


Figure 24 Example of an Invalid Address Flag

The second pair of radio buttons enables Staff to flag the one or more addresses appropriately.

1. *Mailing Address*—Click to specify the Primary address. The system uses the primary address when running notice reports and mailings.
2. *Physical*—Use the *Create a New Address* control button to insert a physical address for Customers w/PO BOX in the other address fields. ***Note: A PO Box is not considered a physical address.***

After completing, click *Forward>>* to continue on to the Groups and Permissions editor.

Figure 25 Customer Registration Address Fields and Options

Groups and Permissions (Section 4)

From the Groups and Positions window (Figure 26) choose the Profile Group for this account. The following table lists the Beaufort County Profile Names:

3Wk-Adult	A-VIS	Adult visitor without internet
3Wk-Juvenile	J-VIS	Juvenile visitor without internet (4yrs-14yrs)
3Wk-Juvenile-I	J-VIS-I	Juvenile visitor with internet (4yrs-14yrs)
3Wk-Teen	TEEN-VIS	Teen visitor without internet (15yrs-17yrs)
3Wk-Teen-I	TEEN-VIS-I	Teen visitor with internet (15yrs-17yrs)
Homebound	HOMEBND	Registered as home bound user
NonRes Adult	NONRES-ADT	Non-resident Adult with Internet
NonRes Juvenile	NONRES-JUV	Non-resident Juvenile (4yrs-14yrs)
NonRes Juvenile-I	NONRES-JVI	Non-resident Juvenile Internet (4yrs-14yrs)
NonRes Teen	NONRES-TN	Non-resident Teen (15yrs-17yrs)
NonRes Teen-I	NONRES-TNI	Non-resident Teen Internet (15yrs-17yrs)
Res Adult	ADULT	Adult user with internet
Res Juvenile	JUVENILE	Juvenile user without internet (4yrs-14yrs)
Res Juvenile-I	JUVENILE-I	Juvenile user with internet privilege (4yrs-14yrs)
Res Teen	TEEN	Teen visitor without internet (15yrs-17yrs)
Res Teen-I	TEEN-I	Teen user with internet privilege (15yrs-17yrs)

Groups and Permissions also allow you to choose to apply filtering to Internet Access, and place "Alert Messages" (page 48) which can only be seen by other staff whenever the customer's record is opened.

Note: The customer does not have access to the contents of Alert messages.

If this user is an adult who wishes to be the "lead" account, you can set the "Family/Group Lead" account flag on this account.

a. *Profile Group*—Use the dropdown box to select the correct user profile (defaults to Adult).
b. *Account Expiration Date*—Evergreen defaults this entry to the Library's Policy interval. *(automatic)*
c. *Internet Access Level*—Evergreen defaults this entry to *Filtered*. *(automatic)*
d. *Active/Barred*—should be set to Active for a new registration.
e. *Set as Family/Group Lead Account*—used to identify an individual as the primary

member of a family/group. There can be more that one Lead account in a group (e.g., Husband and wife Lead accounts for a family of four.)

f. *Claims Returned Count*— Evergreen uses the *Claims Returned Count* to record the number of times a customer claims to have returned a book that cannot be located. Entries are not required for a new customer signup.

g. *Alert Message*—Optional messages (page48) can be entered into the customer's record as needed. The text box allows editing of individual text.
Designated Borrower[5] - When adding a designated borrower to a customer's file, please put the information in as, for example, DB John Doe 2009-04-09, BCL-BEA-PS(Date, system-BCL, branch 3 letter code, staff initials) in the Alert Message field. A customer is allowed to retrieve material for a friend or relative one time without a designated borrower entry. If this happens staff will indicate in the Alert Message field of the person who the material was retrieved for, POWCRD (i.e., Permission W/O Card) with the date and your initials. The note should be deleted when the customer has a valid designated borrower entry. If a customer refuses to assign a designated borrower, please note NODB and the date in the Alert Message field.

After completing the required fields click *Forward>>.*

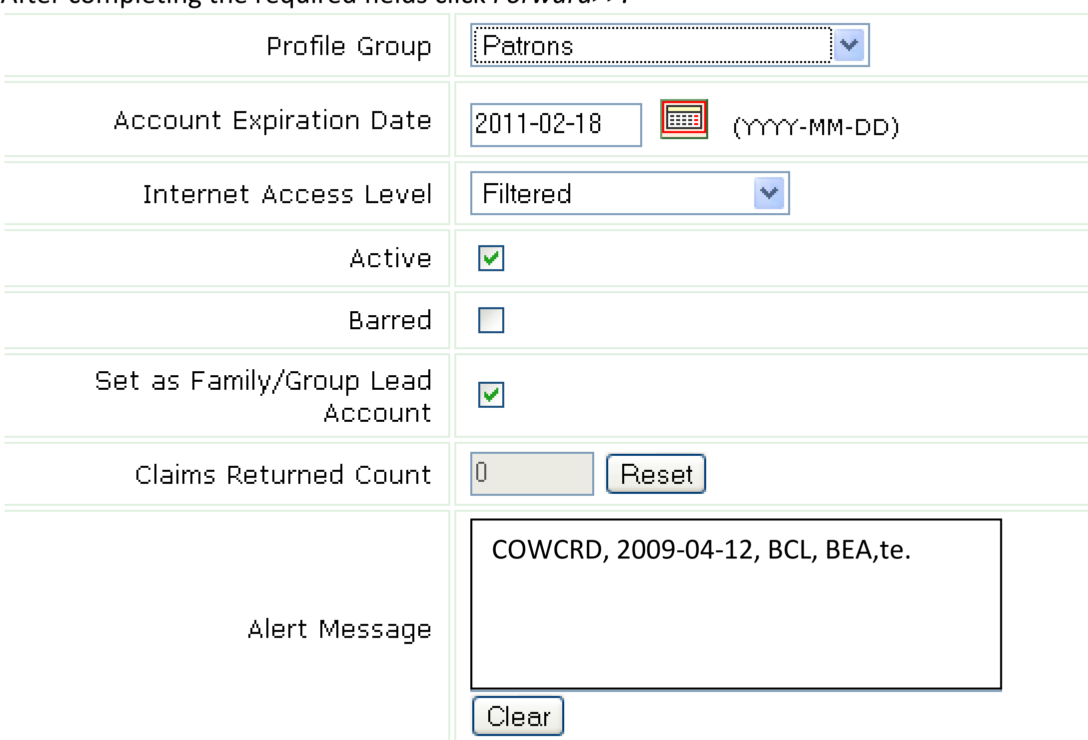


Figure 26 Customer Registration Groups and Permissions Window

[5] Library cards are issued to individuals and may be used only by the person to whom they were issued. The only exception to this applies to a **Designated Borrower** (one or more individuals) who may check out materials for the person who has authorized them to use their card. To apply for this service, the card owner must complete the Designated Borrower form and have a friend, family member or caregiver bring the completed form to the circulation desk.

Statistical Categories (Section 5)

The user category information (Figure 27) being collected by the Beaufort County library categorizes users for statistical purposes. Use the *user category 1* for *Military*, *user category 2 Homeschool*, or *user category 3 Timeshare* as appropriate.
After completing the optional fields click "Forward>>"

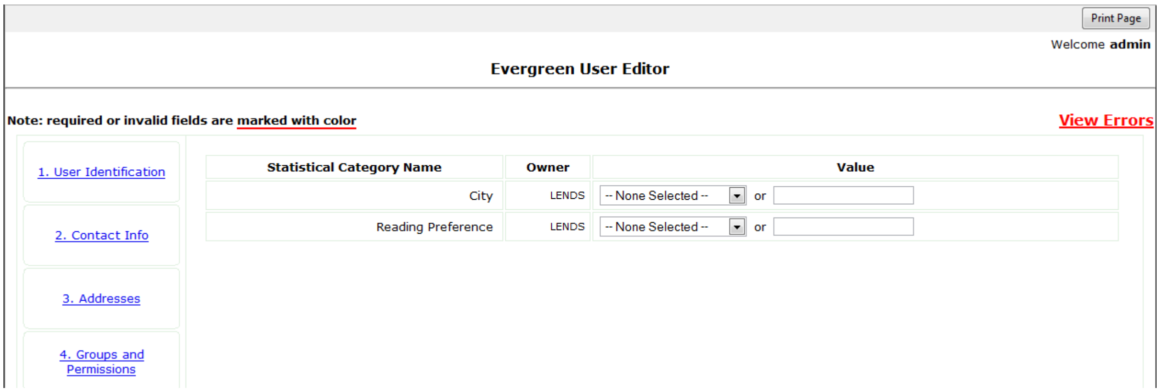


Figure 27 Customer Registration Statistical Categories Window

Surveys (Section 6)

Surveys can be set on a Consortium wide basis, or on a library by library basis.
From this screen, Circ Staff can record customer's answers to any surveys in progress at that time.
After completing the optional fields click *Forward>>.*

Finish (Section 7)

If, when you get to the Finish section (Figure 28) and you see the link View Errors in red at the top right corner of the screen, you should click on it and the editor will display a message stating what needs to be corrected in the customer record:

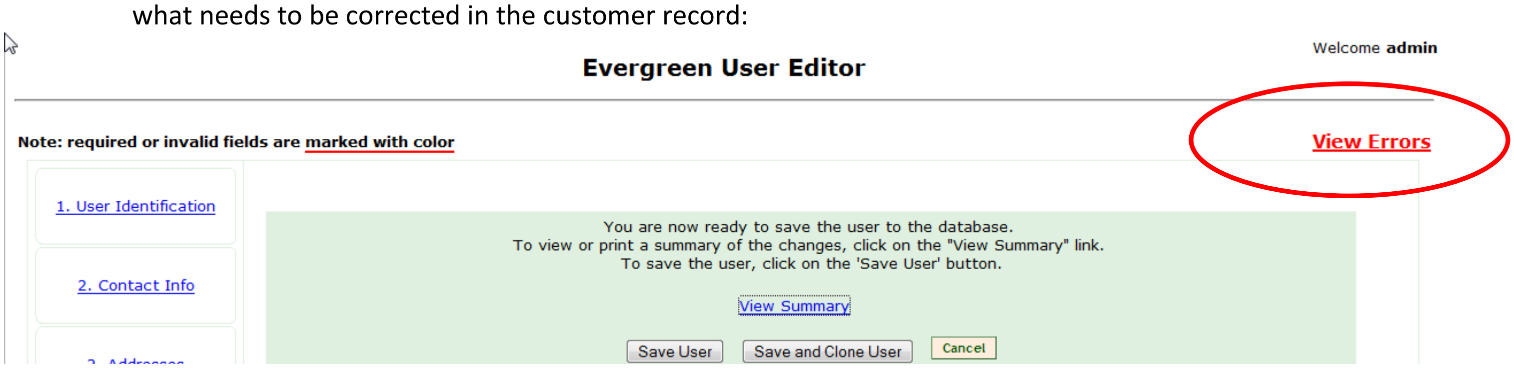
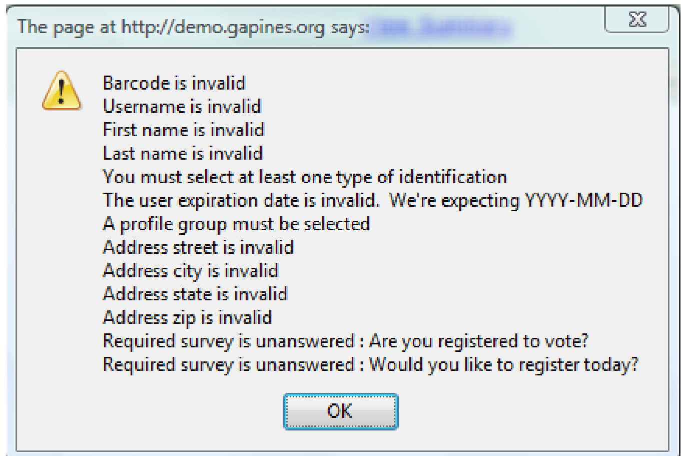


Figure 28 Customer Registration Save-User window



Go back to the screen with the error and correct it and then click on Finish once more.
If there are no outstanding errors, staff can view and/or print a summary (Note the View Summary link) of the customer's registration (Figure 30).

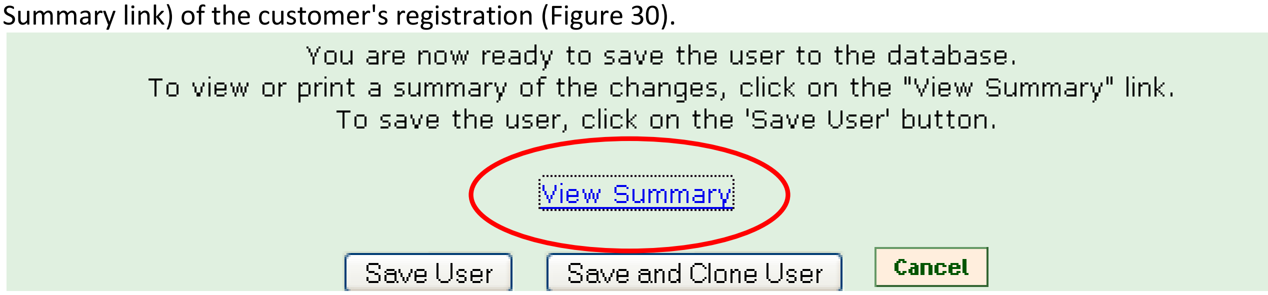
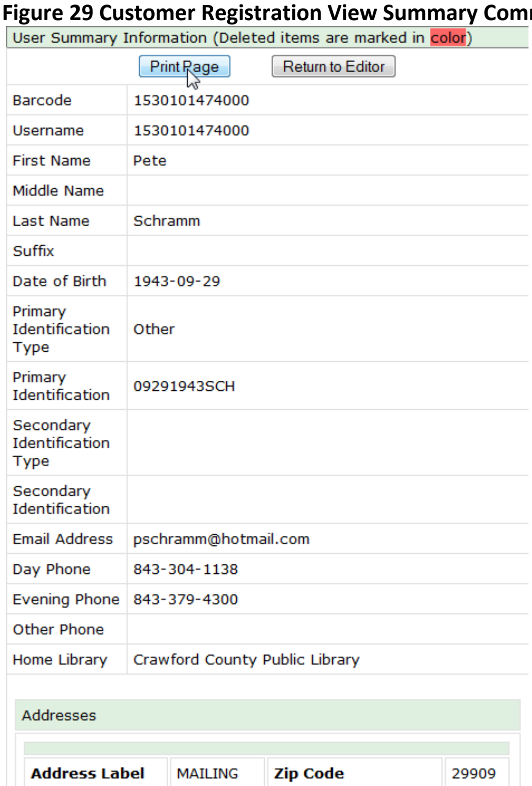


Figure 29 Customer Registration View Summary Command button


User Summary Information (Deleted items are marked in color)

Print Page | Return to Editor

Barcode	1530101474000
Username	1530101474000
First Name	Pete
Middle Name	
Last Name	Schramm
Suffix	
Date of Birth	1943-09-29
Primary Identification Type	Other
Primary Identification	09291943SCH
Secondary Identification Type	
Secondary Identification	
Email Address	pschramm@hotmail.com
Day Phone	843-304-1138
Evening Phone	843-379-4300
Other Phone	
Home Library	Crawford County Public Library

Addresses

Address Label	MAILING	**Zip Code**	29909

Figure 30 Example Customer Registration display

In order to complete the registration entries must be saved.
The message “User update succeeded” appears.

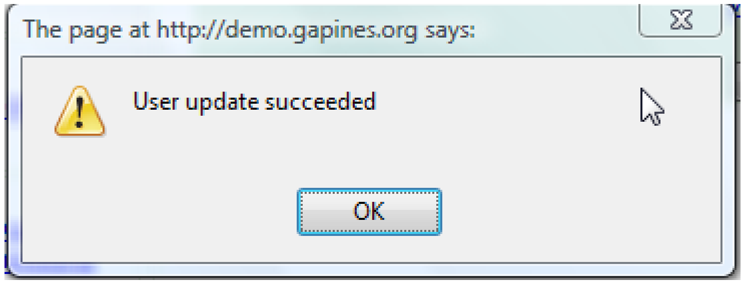


Figure 31 Customer Registration Completed dialog box

Other options—Clone or Cancel the registration.

Copy/Clone –Registering a Family

If you click on Save and Clone User, evergreen automatically creates records for related customers. For example, family members of the first customer with all the common data (address and phone numbers) already filled in. Fields that need to be completed for a cloned entry include the following:

1. Barcode
2. User Name
3. Password
4. Name (First, Middle, Last)
5. Date of Birth
6. Primary ID type
7. Primary ID
8. Email
9. Profile Group
10. Surveys

Note--Evergreen defaults the first entry of a group to be the Lead account.

One circumstance where you might "clone" a user is if a mother and daughter, or husband and wife come in to receive a library card. In the case of Parent / Child start by creating the parent's account and then "clone" the parent's account to automatically populate address and phone number fields. This will save time in entering the other family members. Cloning also automatically "groups" all clones as "members" belonging to the lead (i. e., first customer entered) account.

In addition to the "save and clone" option used with a new customer registration, you can also retrieve an existing customer record & choose Finish & "Save & Clone" (even if you don't need to make any other changes to the record). This opens an "Editing related patron" tab – Contact info is carried over. Other info must be entered fresh.

If you do clone a customer registration, make sure that one record (parent or guardian if available) is set as the "lead account". If all customers are under-18, set the oldest customer as the "lead account" for the group.

Notice in Figure that the *Address* screen indicates that the address is owned by the person whose information was cloned.

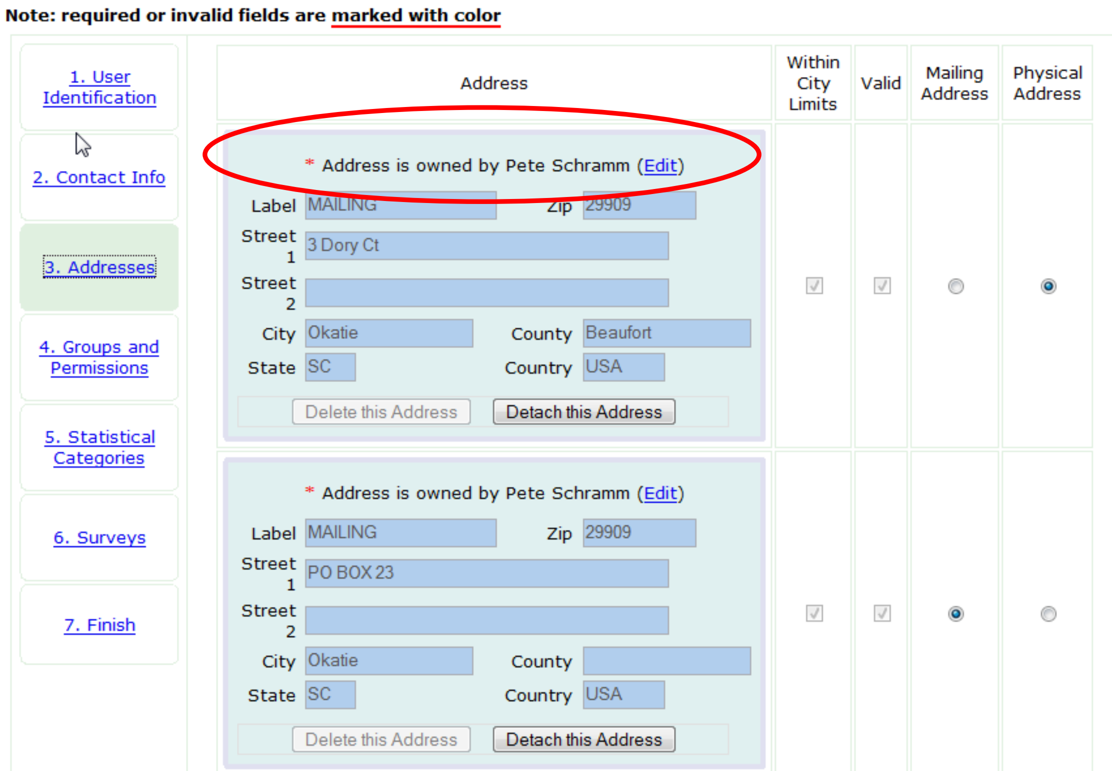


Figure 32 Cloned Address flag

Reviewing Customer Records

Open a customer record to access customer status, checkouts, holds and bills, and extended information. This program feature is of particular benefit when you encounter any of the following:

- Estimated bill message that may appear as you begin to check out a customer's items.
- Customers may need a reminder of the titles already checked out, as well as, due dates for the material.

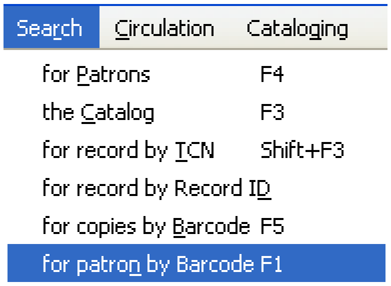
Use navigation toolbar to determine if a customer has material checked out (*Items Out* command button) which is overdue, or Holds placed from the *Holds* command button.
As a courtesy to our customers, overdue items should be renewed (as long as they're not needed to satisfy a hold) so that they can return the item(s) without incurring additional fines.
There are two ways to retrieve a customer record:

- The easiest way is to type or scan the library card barcode.
- The other way to search is to search by name.

The second method is used when the library card number is not available.

Search by Barcode

To search for customers by barcode, press the F1 key or go to the Search menu and click on *for Patron by Barcode*.



A screen will appear (Figure 33) requesting the customer’s barcode or ID number. Enter the number and click on *Submit* or press Enter.

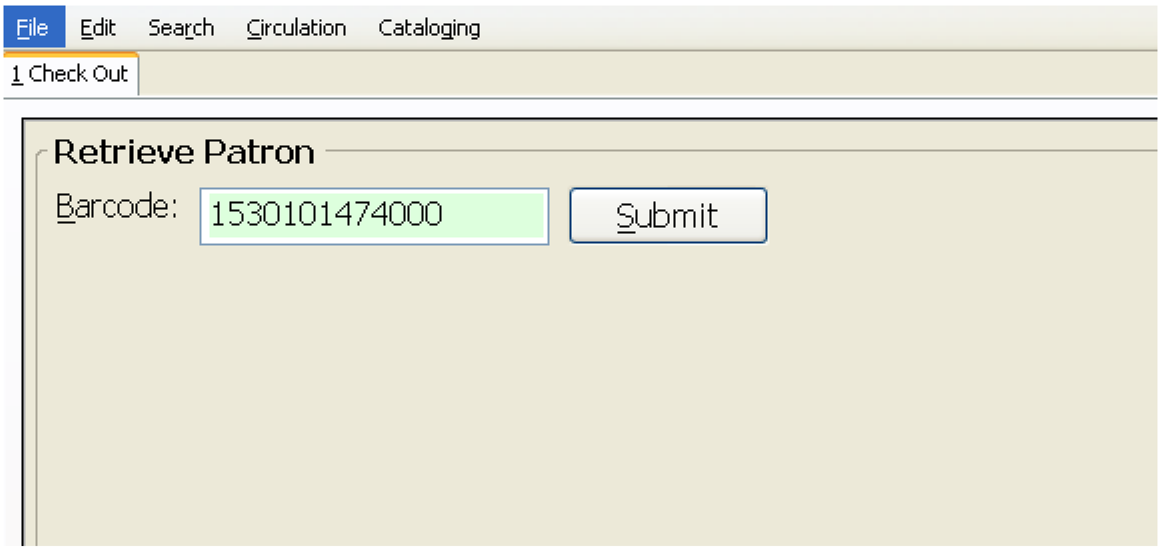


Figure 33 Search for Customer by Barcode

The customer record appears (Figure 34).

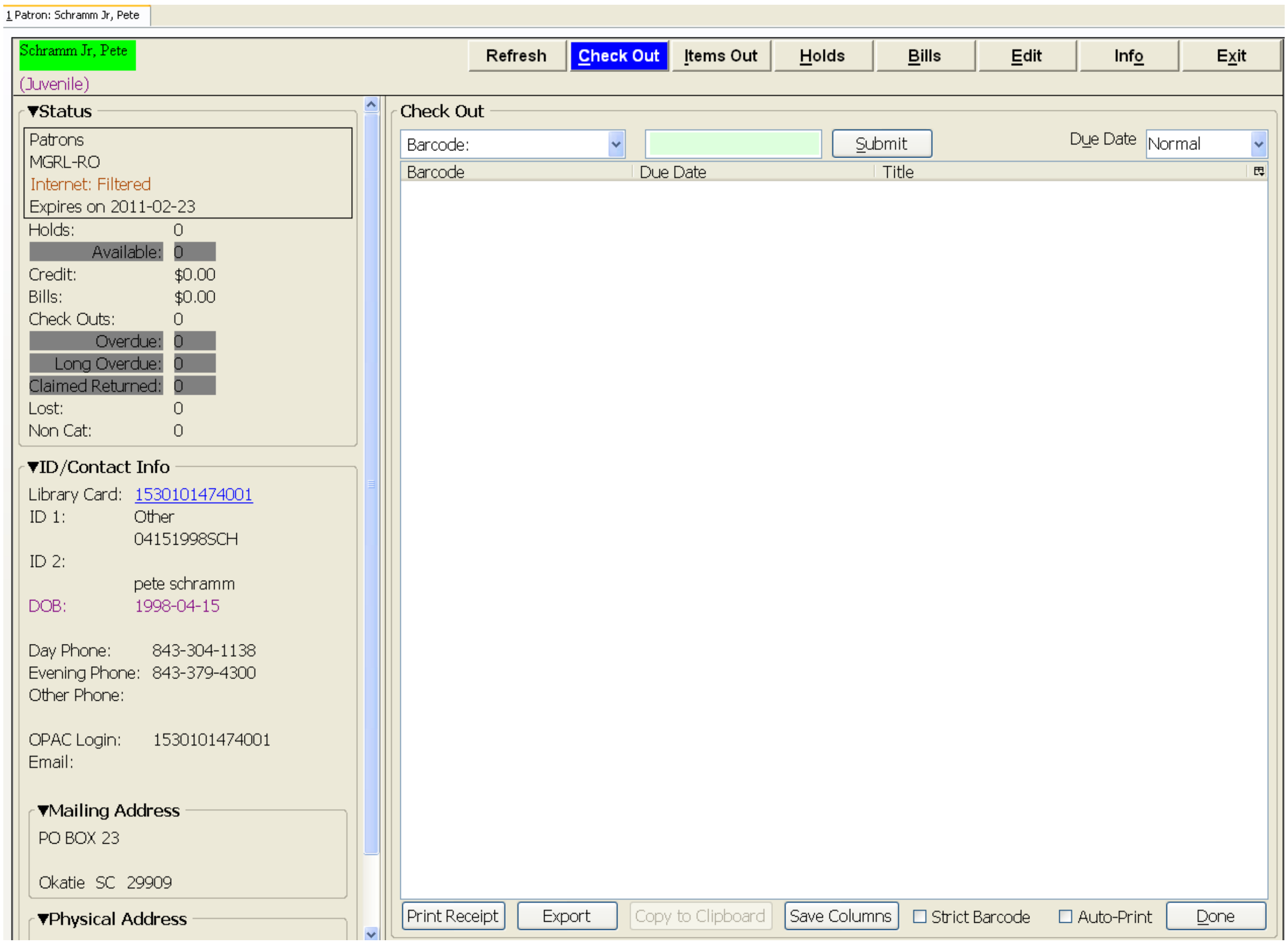
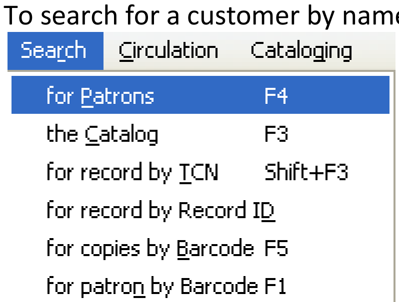


Figure 34 Customer Record--Opening Window

Searching for a customer by name is frequently the method used to find records for customers who have lost their cards or have not used the library in a long time. In this case, staff should do a thorough search using the following method.

Search by Name

To search for a customer by name, go to the Search menu and click on *for Patrons*.



The following search screen (Figure 35) will appear:

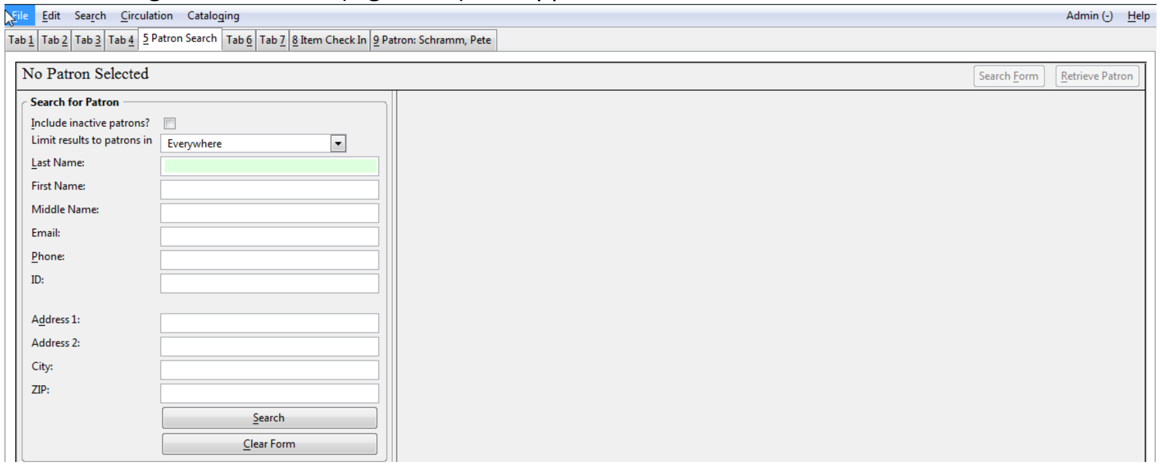


Figure 35 Search for Customer's by . . .

If the check box *Include inactive customers?* is selected, the system will search all customer records, both active and inactive. Staff can also limit the search to active customers by un-checking the box.
The next box down (Figure 36) prompts for the location that the staff member wants to search, for example choose *Everywhere*, if the customer is unsure as to where they originally registered.

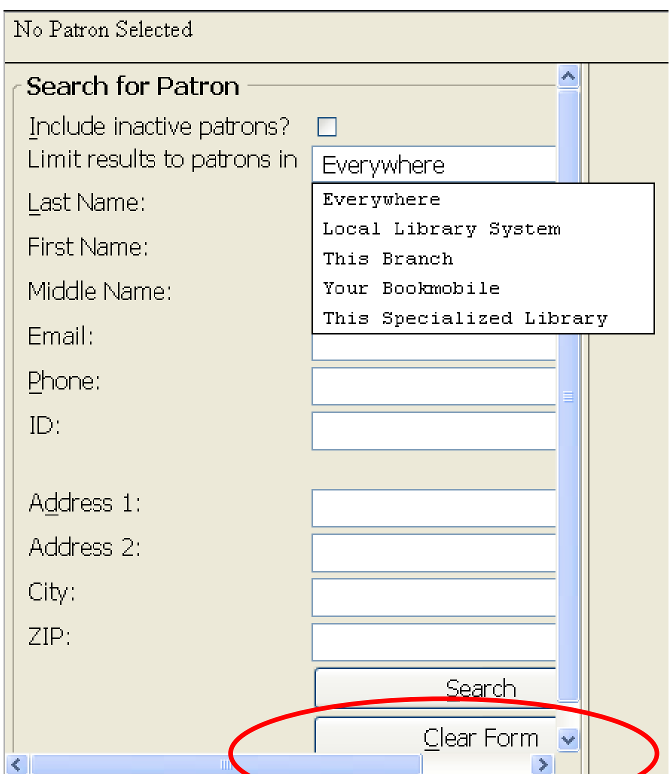


Figure 36 Search for Customer options

From this point, staff can enter any single field or combination for the data listed:

- Last name
- First name
- Middle name

- Email address
- Phone number (include dashes e.g. 843-379-4300) Note **that a partial entry is valid—843 would retrieve all customer records with the area code 843.**
- ID number (searches for the Beaufort County Library Alt-ID. **Note--this is not a search by Barcode.**)
- Address 1
- Address 2
- City
- Zip code

Notice in Figure 36 the Clear Form button. This clears out the search portion of the screen. The system will search and if it finds one or more matches, it will display the customer(s) in the large box to the right of the screen (Figure 37). The more information that is entered the closer the match. Note search results larger then 50 are truncated (Figure 38).

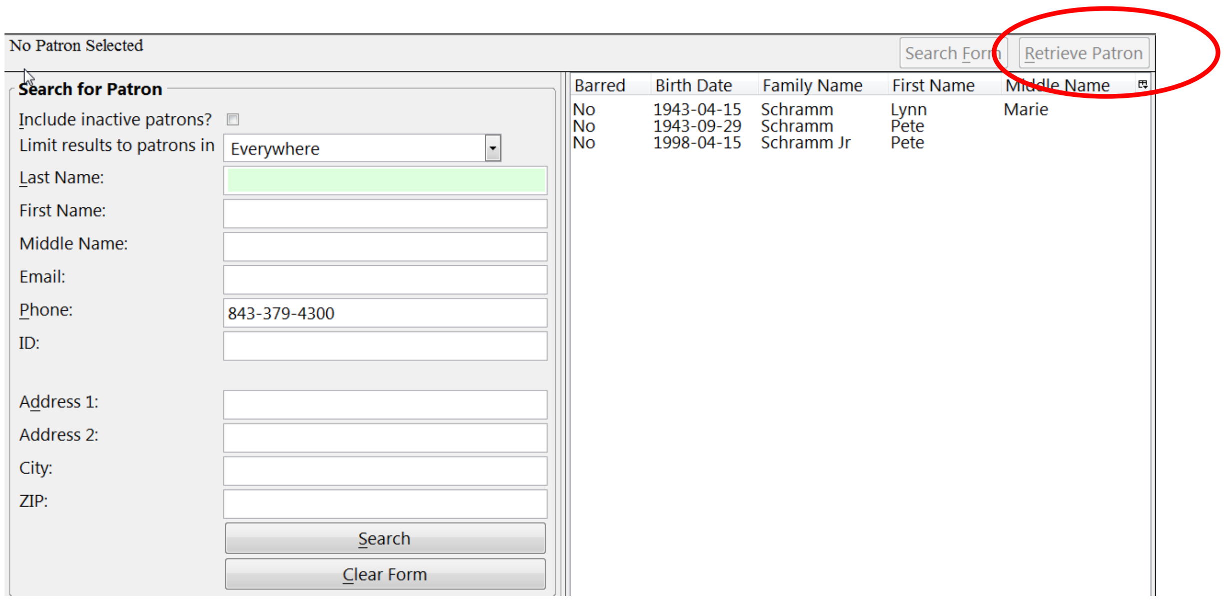


Figure 37 Customer Search Results

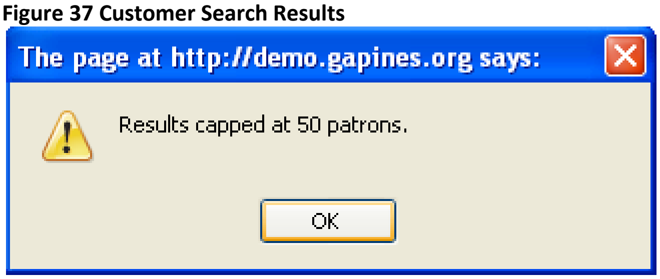


Figure 38 Search results capped

Navigating the Customer Record

After a match has been found, highlight the match and click on the *Retrieve Patron* button (as shown in Figure 37).

Figure 39 Customer Record example with an Alert

The full customer record appears.

The customer name appears in the top left hand corner of the screen. Beneath the name are any *Alerts* or *Note* indicators as well as the *Alert* text box. A customer record that has an Alert will initially display a Stop message along with the Alert message text in the field to the right. Press a *navigation toolbar* control button to continue.

Below the Alert window, on the left side of the screen, is the customer *Status* summary. This box displays the customer profile, the name of the home library (where they are registered), whether or not the customer has filtered or unfiltered internet access, and the expiration date of the library card.

The next section lists:

Number of holds the customer has placed
Number of holds that are now available for pickup
Total amount of any bills due
Total checkouts
Total items overdue
Total items long overdue
Total items claimed returned
Total items lost
Total items checked out that have not been fully cataloged (non-cat)

The final section (visible via the scroll bar) contains *ID / Contact information*, including:

Library card number (barcode)
ID 1 and/or 2
Date of birth
Day phone
Evening phone
Other phone

OPAC login (this can be changed by customer from customer ID to something else)
Email address
Mailing and/or Physical address

To the right at the top of the screen is the navigation toolbar which enables the staff member to perform tasks, such as retrieve information about the customer, or to edit the record. They are:

1. The *Refresh* button updates the screen display. This will often occur automatically after a change, but when in doubt, press the Refresh command to restore the screen to current information
2. The *Check out* button prompts for item barcodes to check out materials (Figure 40).

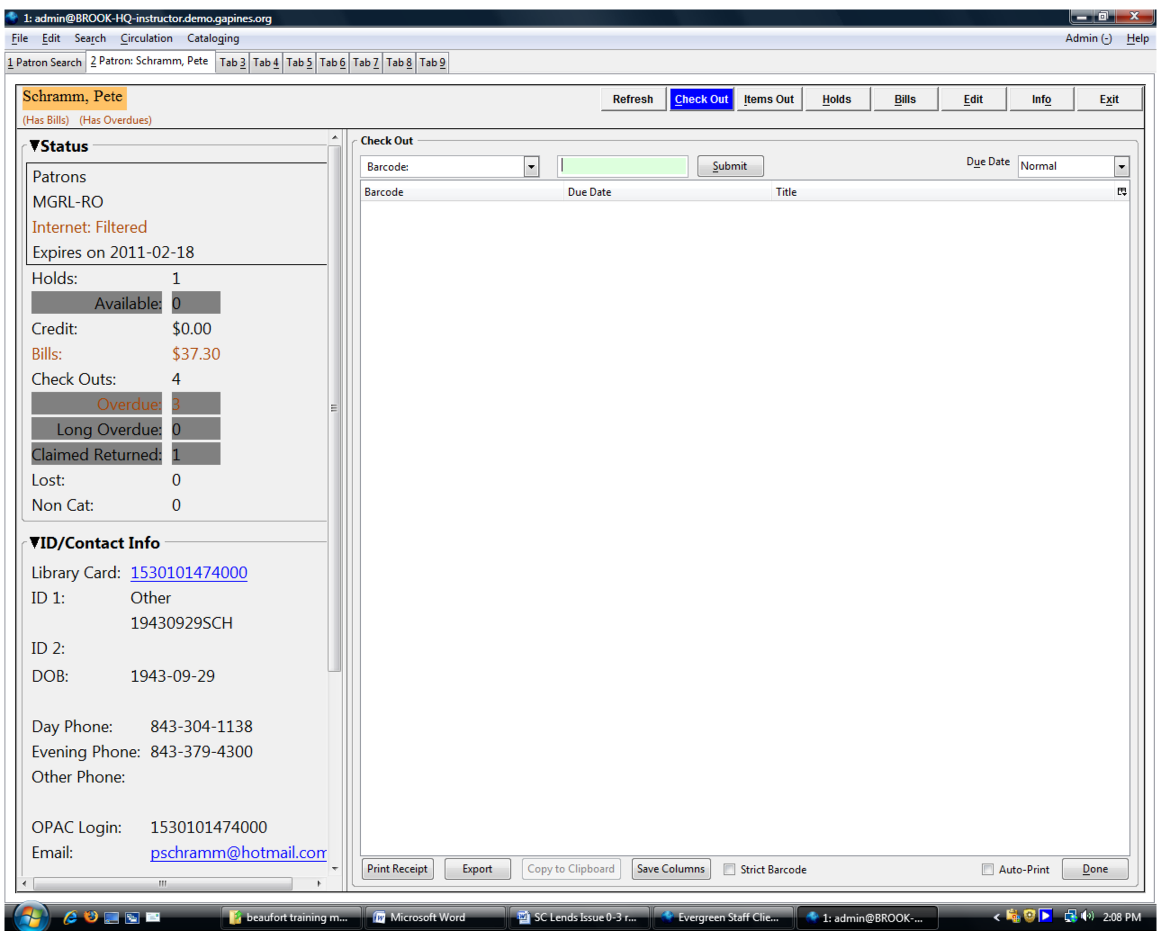


Figure 40 Check out Display

When selected, notice that the *Check Out* window displays a toolbar at the bottom of the window (Figure 41).

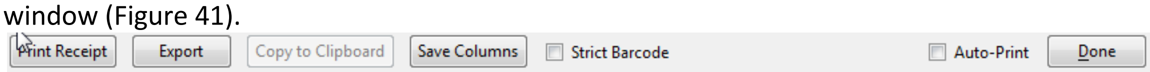


Figure 41 Checkout Toolbar

Print Receipt— generates a print out of the information contained on the screen.
Export—will generate a file to export the data as a .csv file Refer to Appendix 7 for further information on CSV files.

Copy to Clipboard—copies the data to the clipboard.
Save Columns—saves the configuration of the columns headings.
Strict Barcode check box—when checked forces the system to accept only barcodes in the correct configuration.
Autoprint check box—when checked forces Evergreen to automatically print a receipt.
Done—closes that customer screen.

3. The *Items Out* navigation toolbar button displays the items that the customer currently has checked out. Notice also that the *Items Out* window is split in two panes with the bottom window available for displaying Lost, Claimed Returned, Long Overdue and outstanding items associated with Unpaid Bills.

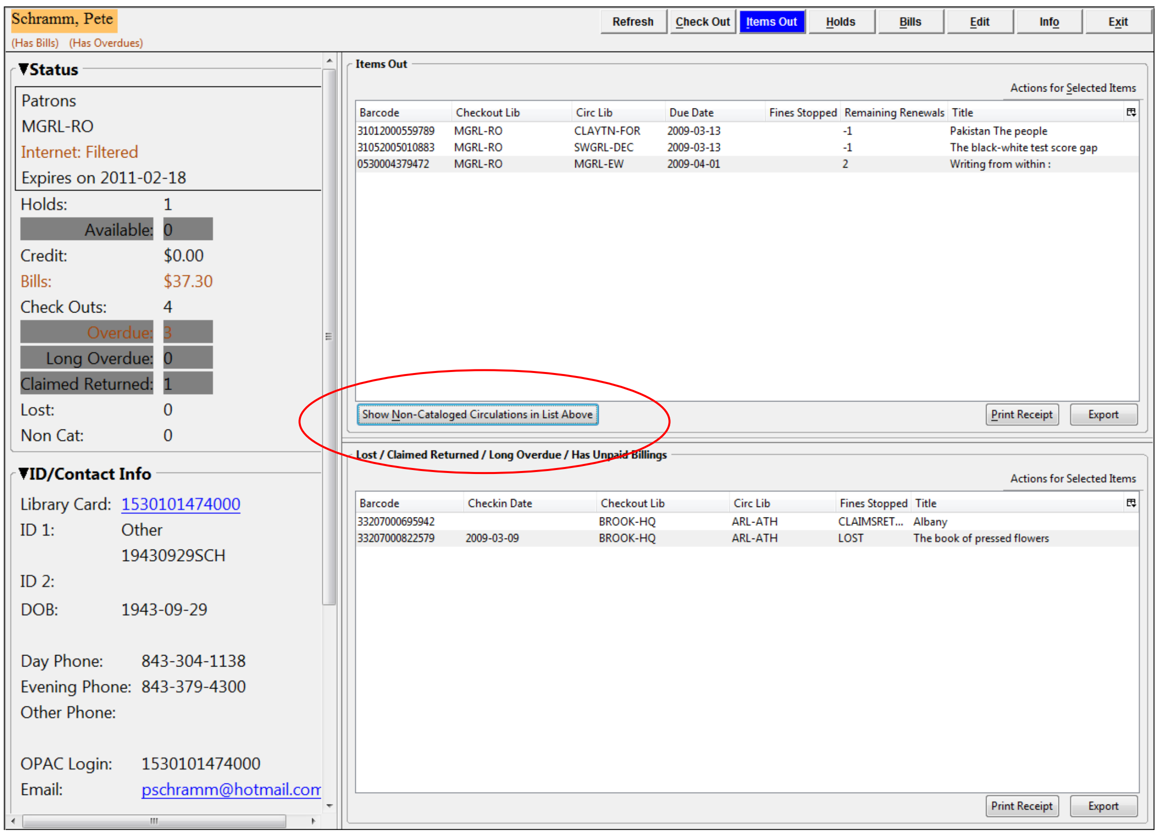


Figure 42 Items Out Display

At the bottom of the top section (circled in red) is a command button labeled *Show Non-Circulations in List Above*. Clicking on this button will display any non-circulating items the customers may have out along with the circulating items.

4. The *Holds* button displays details of the material the customer may currently have on hold.

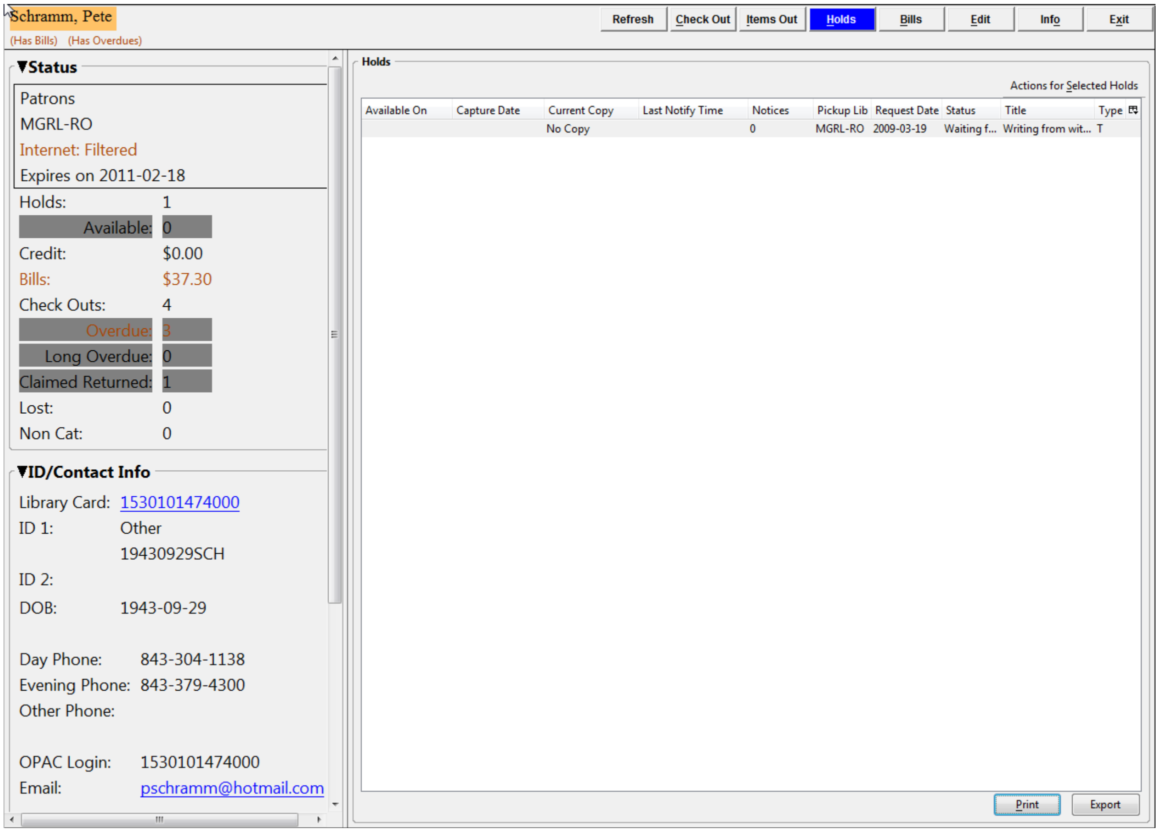


Figure 43 Customer Holds List

5. The *Bills* button will display all information pertaining to a customer's bills—for fines and other bills e.g. damaged material. This is where bills other than fines are created and payment is applied to the bills. Fines are automatically calculated and added to the customer record by the Evergreen system.

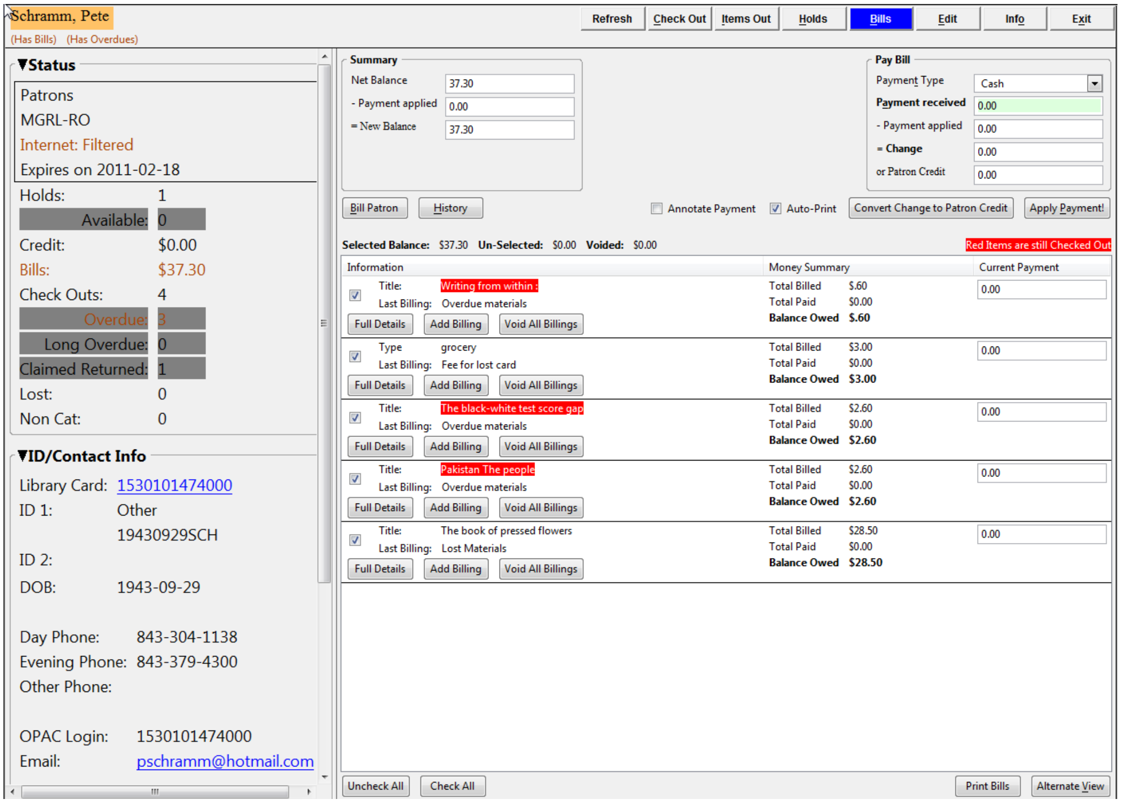


Figure 44 Customer Bills Display

6. The *Edit* button gives access to the Evergreen User Editor, where changes can be made to the customer record.

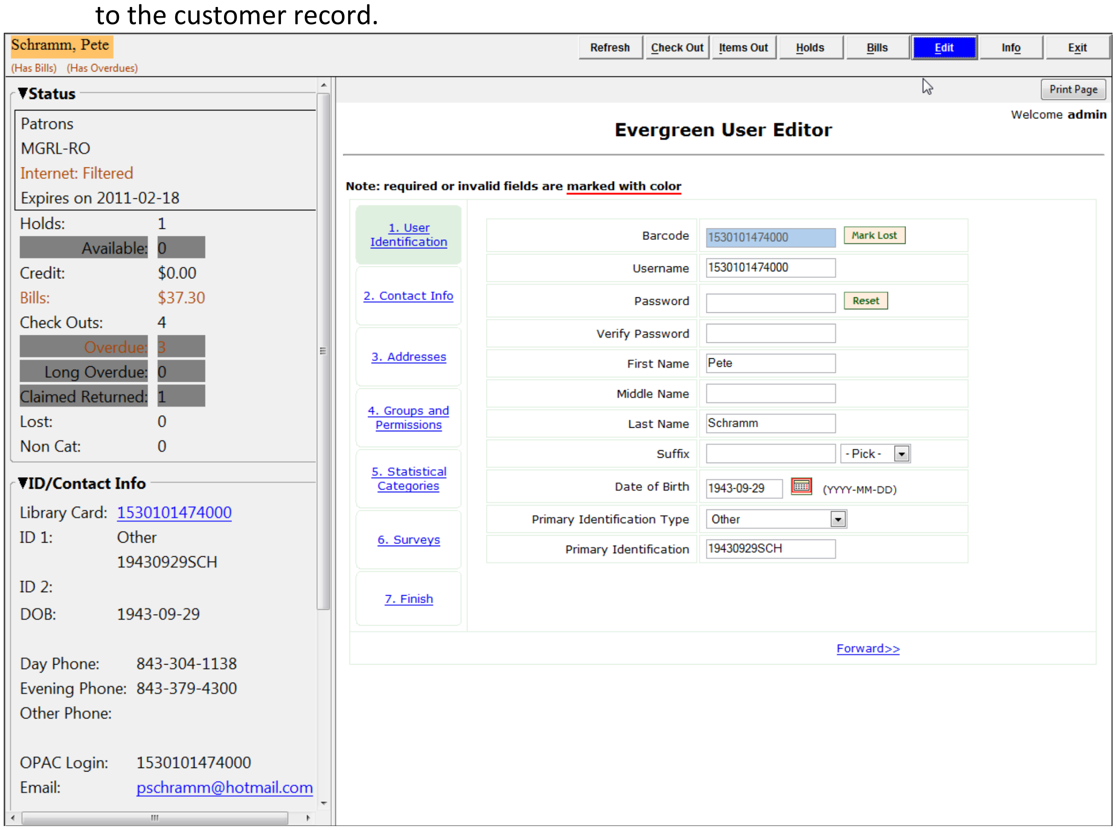


Figure 45 Modify Customer Record Editor

The *Info* button displays notes that have been added to the customer record. Any note message created by staff should include the Entry Date, system initials, branch initials, and staff initials. For example, Please call the Beaufort Branch 843-470-6500 to update your email address. 2009-04-27, BCL, BEA, te.

Notes are added and deleted to the customer record from this screen. The contents of a note cannot be edited. To change the contents of a note remove the note and create a new note with the changed information.

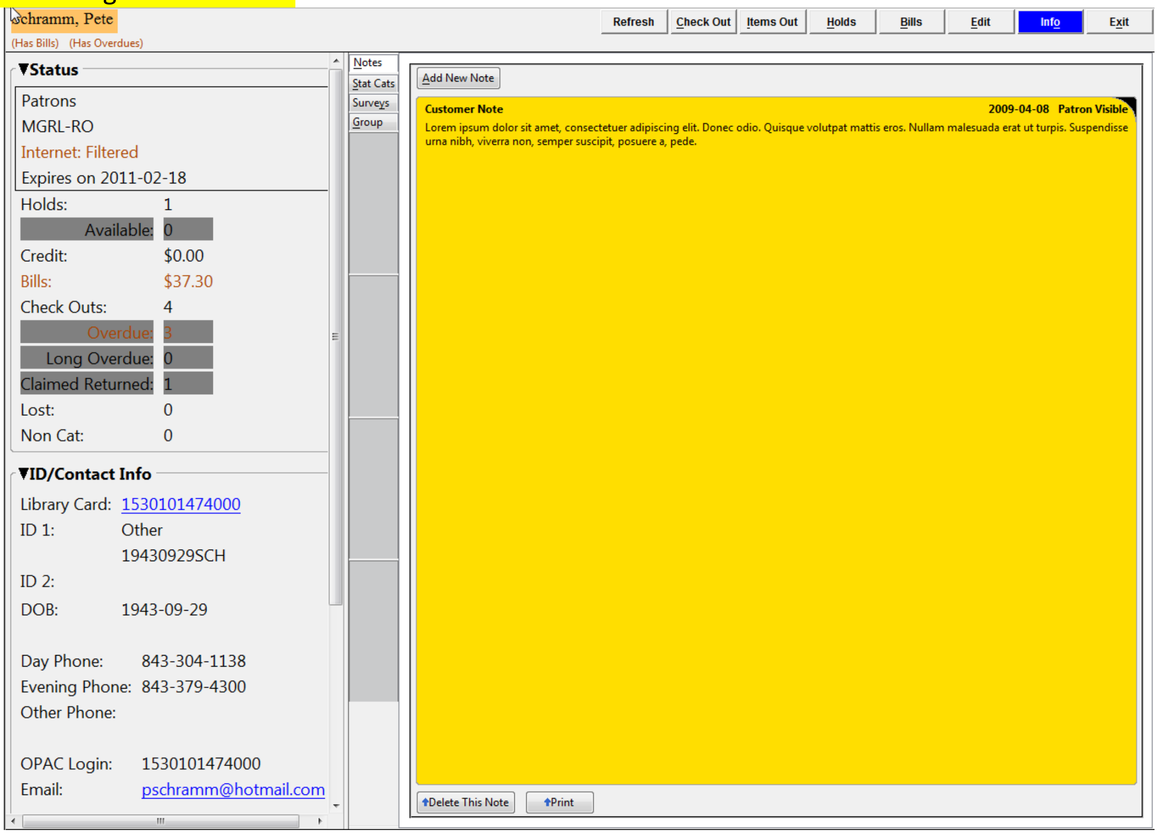
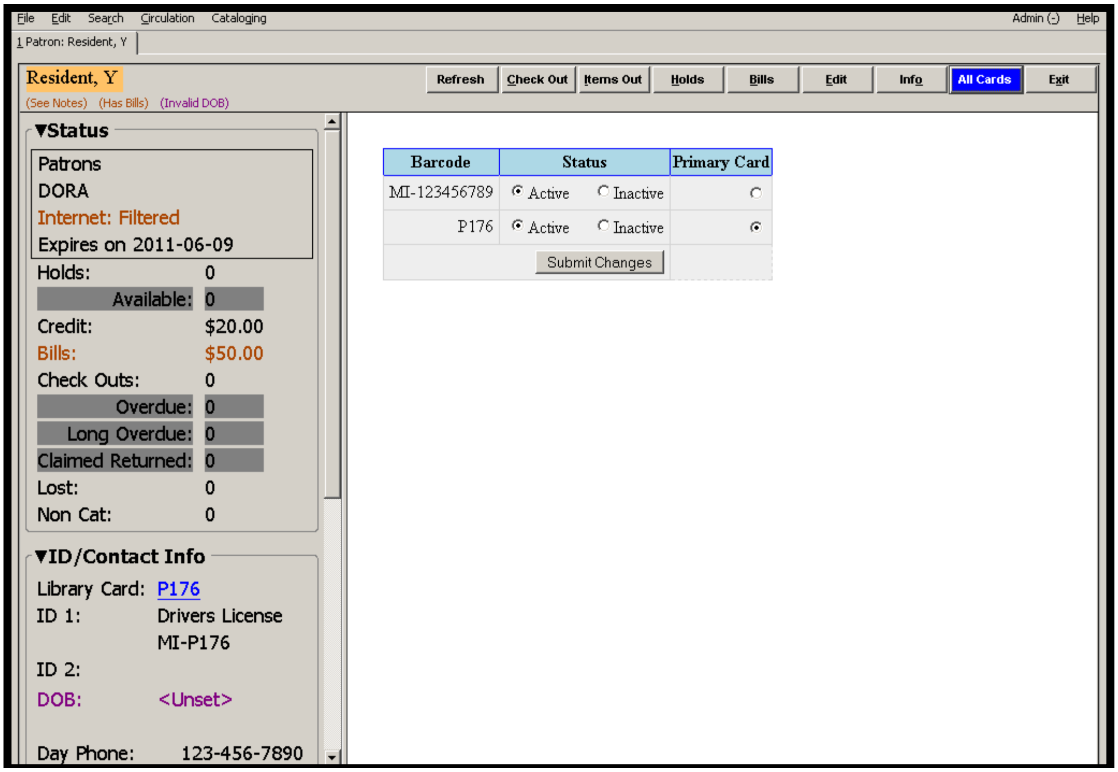
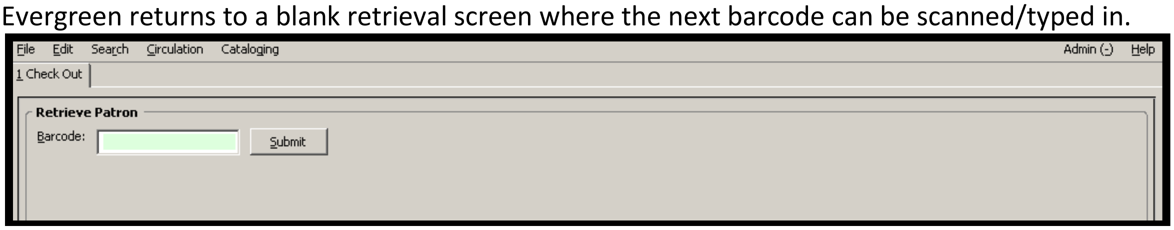


Figure 46 Customer Notes, etc

7. The *All Cards*[6] button displays one or more customer IDs including lost cards, and indicates which ID is the lead ID. IDs can also be made active or inactive from this screen.



8. Finally, the *Exit* button will exit the customer record. When this button is clicked, Evergreen returns to a blank retrieval screen where the next barcode can be scanned/typed in.



Modify Customer records

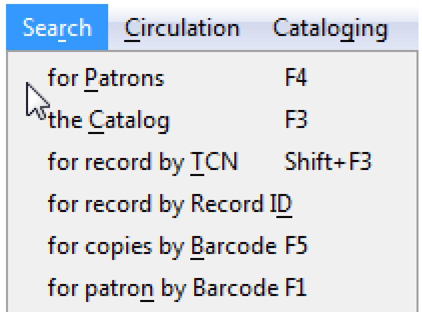
Note: SC LENDS has a combined Customer database. All libraries will be able to update customer information from all other libraries thus making keeping up with new telephone numbers and addresses easier.

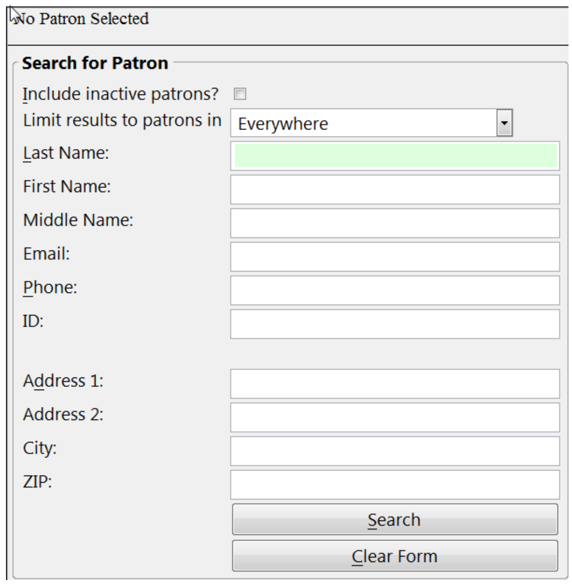
Use this procedure to edit information in an existing user record.

Retrieve a Customer by the generalized customer search or by searching by barcode.

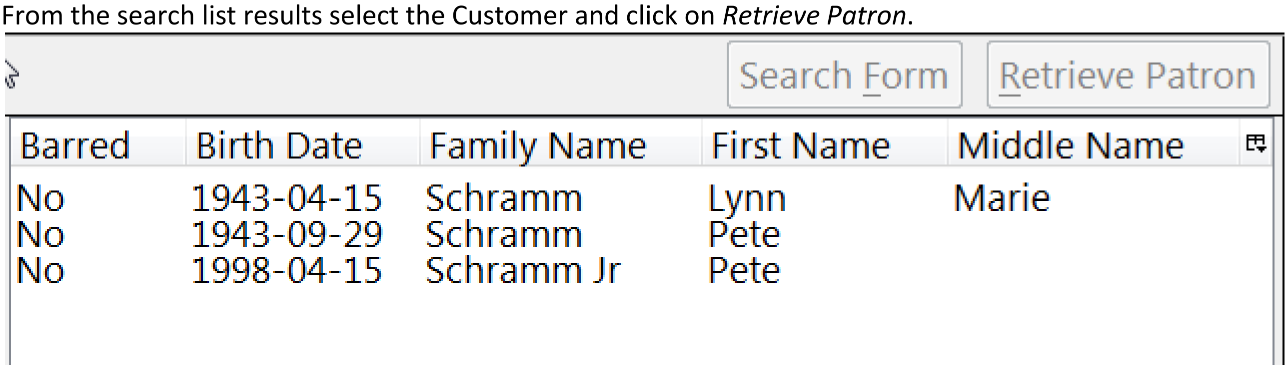
Select ***Search > for patrons*** or press **F4**

[6] All Cards is not available in this software release.

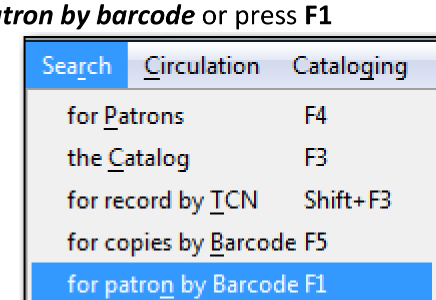




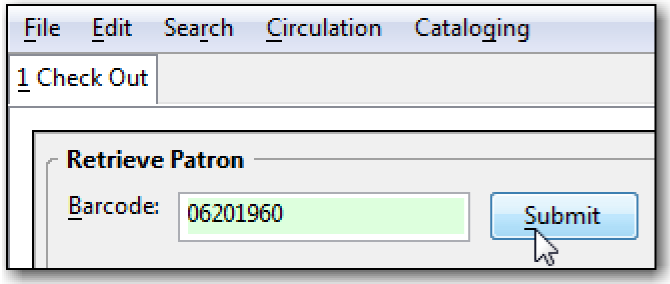
From the search list results select the Customer and click on *Retrieve Patron*.



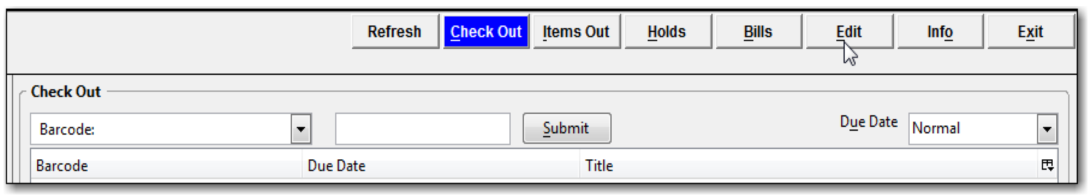
Or select ***Search > for patron by barcode*** or press **F1**



Scan the barcode and click *Submit* or press **Enter**.



Once a customer is loaded into check out screen click *Edit* to retrieve their record



Note--If a customer is logged in to OPEC the system blocks you from saving any changes to the customer record.

Alerts

If a Customer's record has an alert, a red *Stop* sign is displayed when the record is retrieved.

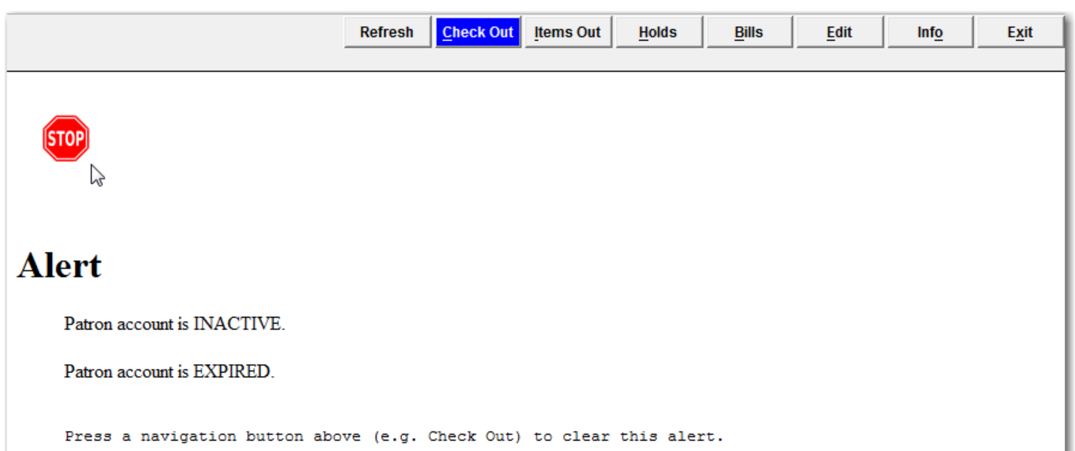


Figure 47 Example Alert Message

Some alerts are system-generated (e.g. "Patron account is EXPIRED"). Other alerts are staff-generated.

Pay attention to the Alerts and Note indicators when they appear on a user's record.

In order to edit the Alert Message field click *Edit* on the navigation toolbar and then the *Groups and Permissions* link (Figure 26). Alerts that are no longer needed should be deleted thus removing unnecessary alerts from the customer's account. Editing is character oriented so typical text editing features (.e.g., backspace, delete, cut/paste) work as expected. The *Clear* command button (Figure 48) will delete all text. **Note however, text changes are not saved until you navigate to the *Finish* screen and click *Save User*.**

The *Alert Message* field will hold more than the five lines of visible text. As entries exceed the window size a slider bar appears. See page

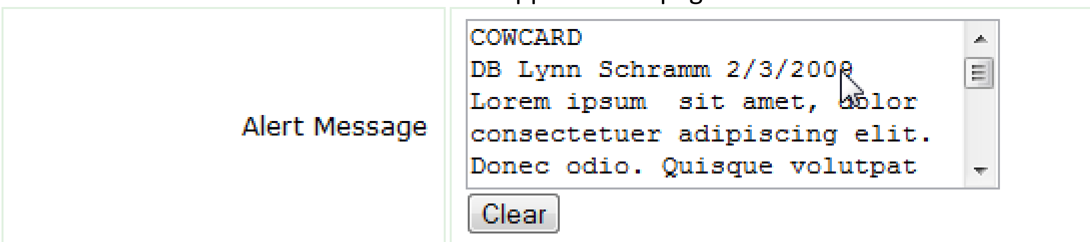
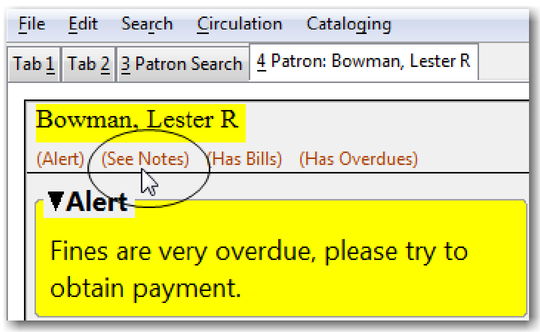


Figure 48 Alert editing field showing the *Clear* command button

Notes

If there is a note on a Customer's record, a *See Notes* message appears when record is retrieved (Page 35).



Customer Notes are accessed from the *Info* navigation toolbar button.
Although Staff can add or delete a note the contents of a note are **not** editable. Notes are strictly communicative and in the Evergreen client are only visible from within the *Notes* field. At the discretion of the library staff, notes can be made visible to the customer, via their OPAC login. It is good practice to be professional when wording a note visible to the customer.
Because notes in the database are consortium-wide, it is good practice to identify which library and staff member created the note; see page 23.

To create a note click *Add New Note* (Figure 49). Enter note information and click *Add Note*. In this example on Figure 50, *Patron Visible* is selected.

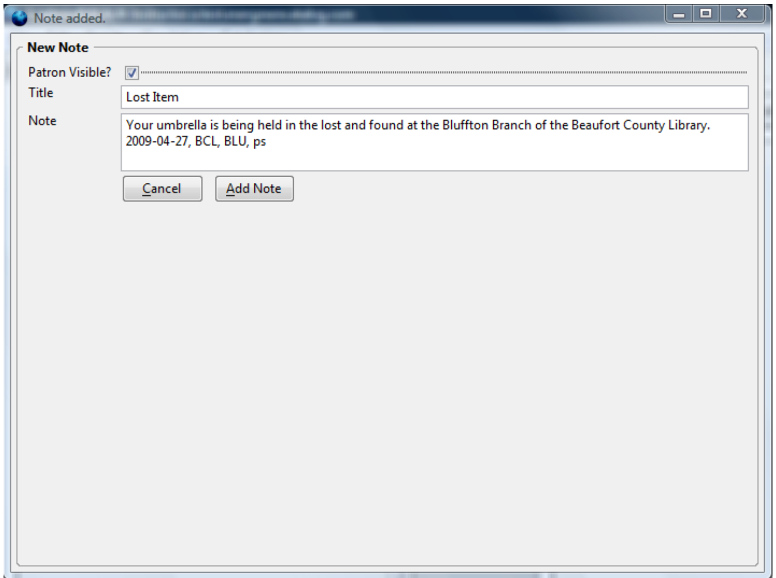


Figure 50 Example Note dialog box

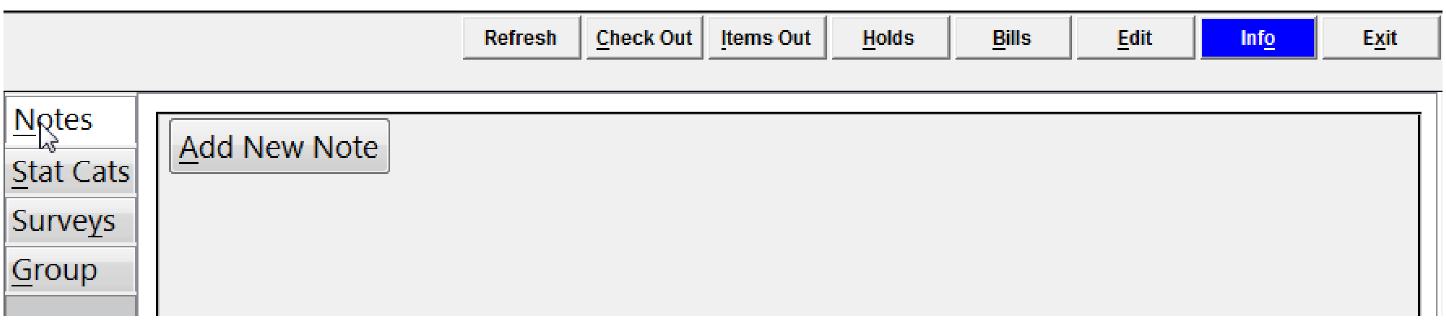
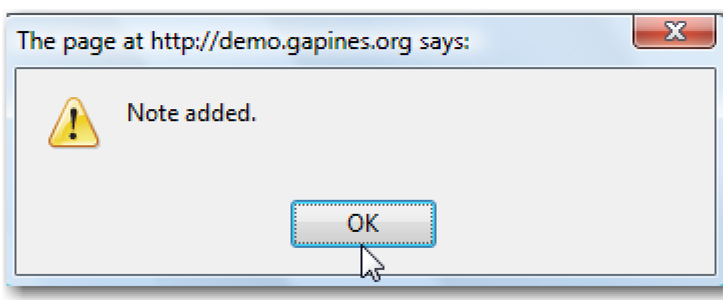


Figure 49 Adding a Note into a customer record

Click *OK.*



Common Edits and Updates

Renew Customer's Privilege

After verifying customer information, reset the *Account Expiration Date by* proceeding to the *Groups and Permissions* section of the customer record (Figure 26). Enter an expiration date of one year from today's date for standard customers or the appropriate date for specific customers, such as a three week card holder.

Remove a Customer

To remove a customer, proceed to the *Groups and Permissions* section of the customer record (Figure 26). Click the *Active* check box (turn off the check in the box) and save your change. (Note the confirmation message is the same as any other record change). Evergreen sets the account to INACTIVE.

A later *Search for Patron by Name* will show no result; however if you *Search by Barcode* the system will display the customer's record with and Alert Message "Patron account is INACTIVE." The record remains attached to the customer until manually purged from the database.

User Lost Card

To reset the customer's barcode, proceed to the *User Identification* section of the customer record Figure 52). Click *Mark Lost* -- Evergreen removes the barcode from the field and turns the field red (Figure 51).

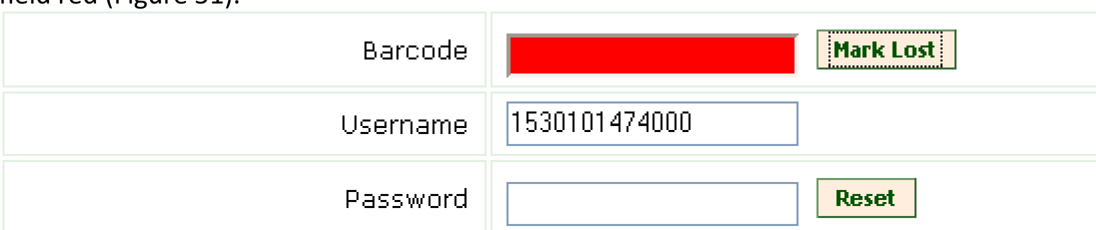


Figure 51 Prompt for a replacement customer ID barcode

A prompt appears asking "Deactivate Original Card?" click on *OK*.

Note: Bills for lost cards must be manually entered on the customer's account.

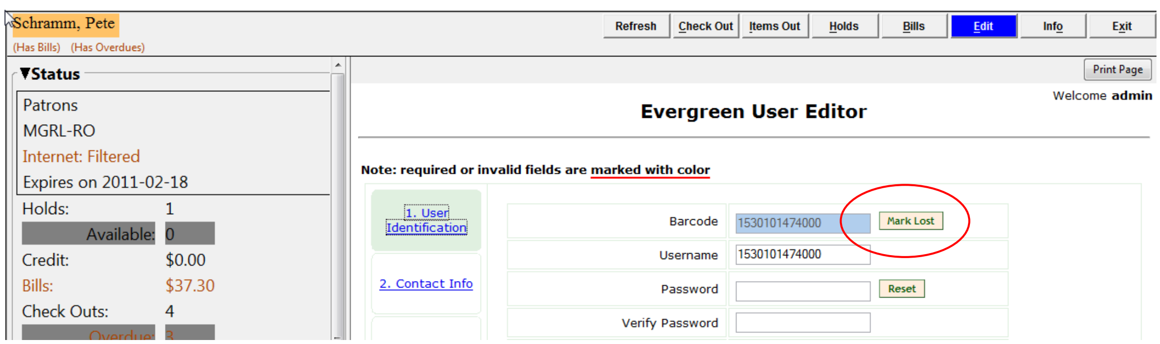


Figure 52 User Lost Card -- Mark Lost

Scan or type new barcode in blank field. As the Username field is coupled to the customer's barcode, make sure you proceed to the paragraph in this document (Reset Username page 52) on resetting the username field before completing this proceedure.

It is important to note that the old barcode IS NOT freed up for use. It remains attached to the customer until they are manually purged from the database. If someone tries to use the Inactive card, they will be stopped.

Alert

Patron account retrieved with an INACTIVE card.

Figure 53 Example lost Card Alert

Reset Username

Unlike passwords, you can see the Username for a customer in their record, so if they change it and forget what they changed it to, they can acquire that information from the staff (in person, after presenting the proper ID).

Check the customer's *Username* field for changes. If a customer prefers to match their usernames to their card numbers, those numbers should reflect the current card. Therefore, if the username is still the original barcode, you should delete it and enter the new barcode; otherwise, their username – which they use to log onto the OPAC – will still be their lost card number (Figure 54). **Users have the option of creating a Username that is unique. So be careful not to replace the current Username with the new barcode without checking with the customer.** In the example shown in Figure 54, the customer's username is still their lost barcode number.

Click *Finish* and *Save User*.

Barcode	1530101474123 Mark Lost
Username	1530101474000
Password	Reset
Verify Password	
First Name	Pete
Middle Name	
Last Name	Schramm
Suffix	- Pick -
Date of Birth	1943-09-29 (YYYY-MM-DD)
Primary Identification Type	Other
Primary Identification	19430929SCH

Forward>>

Figure 54 Barcode -- username mismatch after ID change

Reset Password –

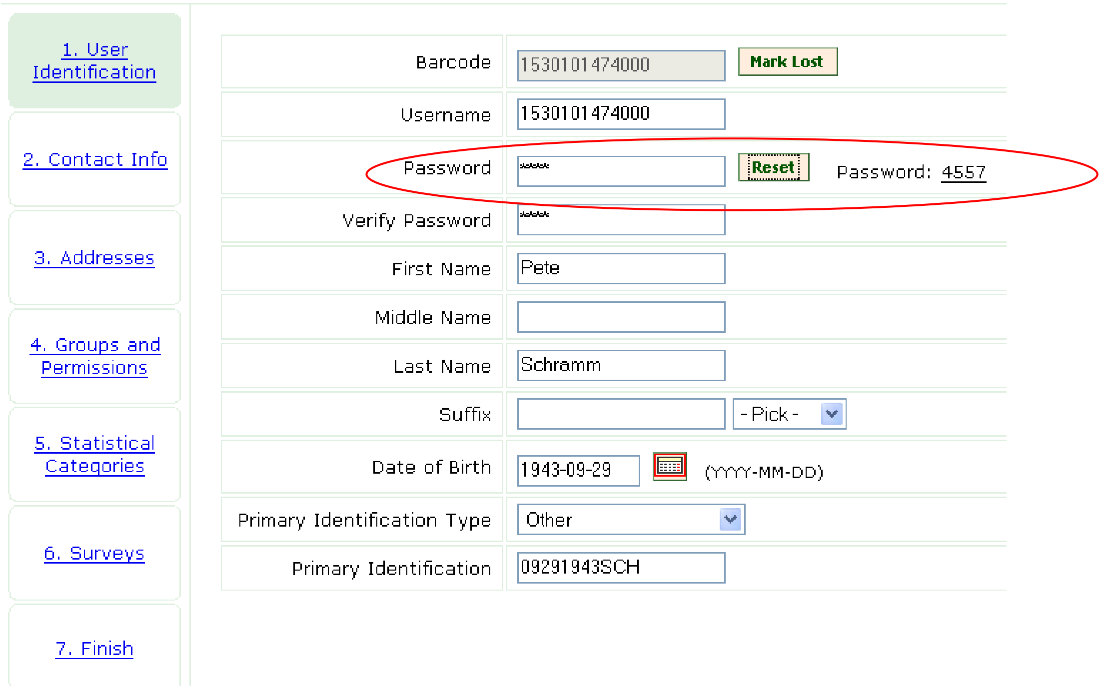


Figure 55 User password hidden from Staff view

The customer's password is normally hidden from Staff view; therefore, customers who misplace their 4-digit temporary password (or their permanent number--see Appendix 3 for background on how customers change to their permanent passwords) will need to have the password reset to a new number. For security purposes staff is unable to give the customer their current password—the field is shown as a blank field (Figure 54). The alternative is to reset the password to a new temporary password for the customer. Click on the *Reset* button (Figure 55) in the *User Identification* section the new four digit number will appear next to the *Reset* button.

Note: Make sure you give the customer their new temporary number, remind them that the system will prompt them for a permanent number when they next enter OPAC, and before losing your work, be sure to go to finish and save the modified record.

Update Phone Numbers

Enter new or changed phone numbers in the *Contact Info* section (Figure 23).

Modify a Group relationship

To review and modify the group relationship of customers from the navigation toolbar of the customer record click on ***Info > Group***. The following screen is displayed.

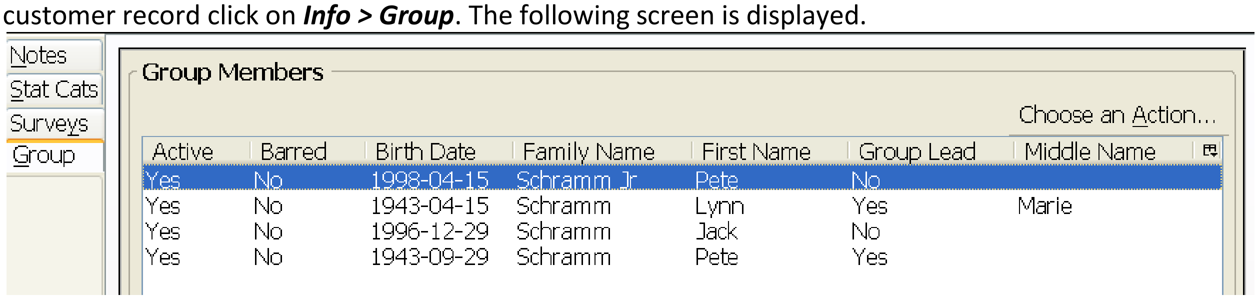


Figure 56 Example Group Relationships

From the *Choose an Action* command button staff can perform any of the following actions:

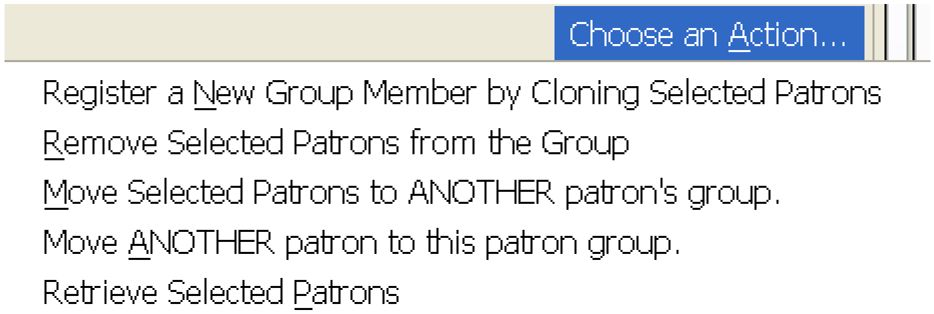
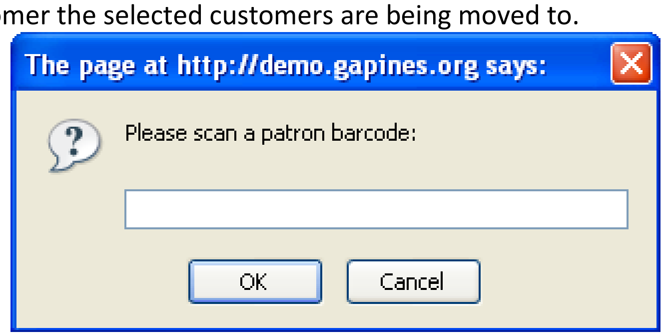


Figure 57 Group Actions

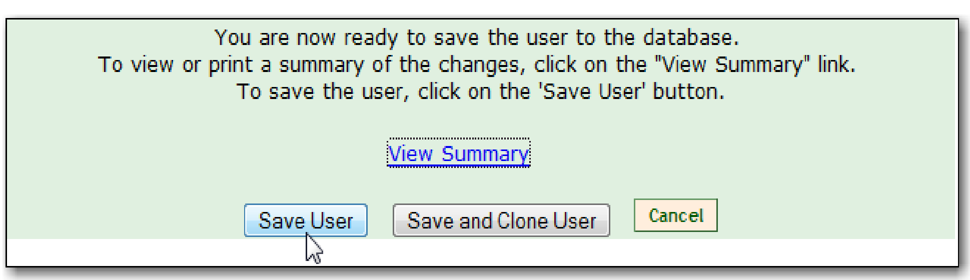
Register a New Group Member by Cloning Selected Patrons will start a customer registration based on cloning the information from the highlighted customer.
Remove Selected Patrons from the Group will remove selected customers from the existing group.
Move Selected Patrons to Another Patron's group will open a dialog box requesting the barcode number of the customer the selected customers are being moved to.



Move Another Patron to this patron group will open the same dialog box as above so the customer being moved in this group can be identified.
Retrieve Selected Patrons will open one or more customer records in separate tabs.

Update Addresses

To review and modify customers' addresses, from the navigation toolbar of the customer record, click on ***Edit > Addresses*** section Figure 25 and enter new, additional, or updated addresses in the *Addresses* section.
Edit any other required customer fields and click *Finish* then *Save User*.



Barring and Unbarring Customers

Customers are prevented from placing a hold or checking out material or using library computers if they are barred. Evergreen requires an Alert message be placed in the customer's record when barring a customer. The Alert Message should give information about why the customer was barred, which library barred them, and the date they were barred. A similar message should also be entered as a customer viewable note in the customer record .e.g.,

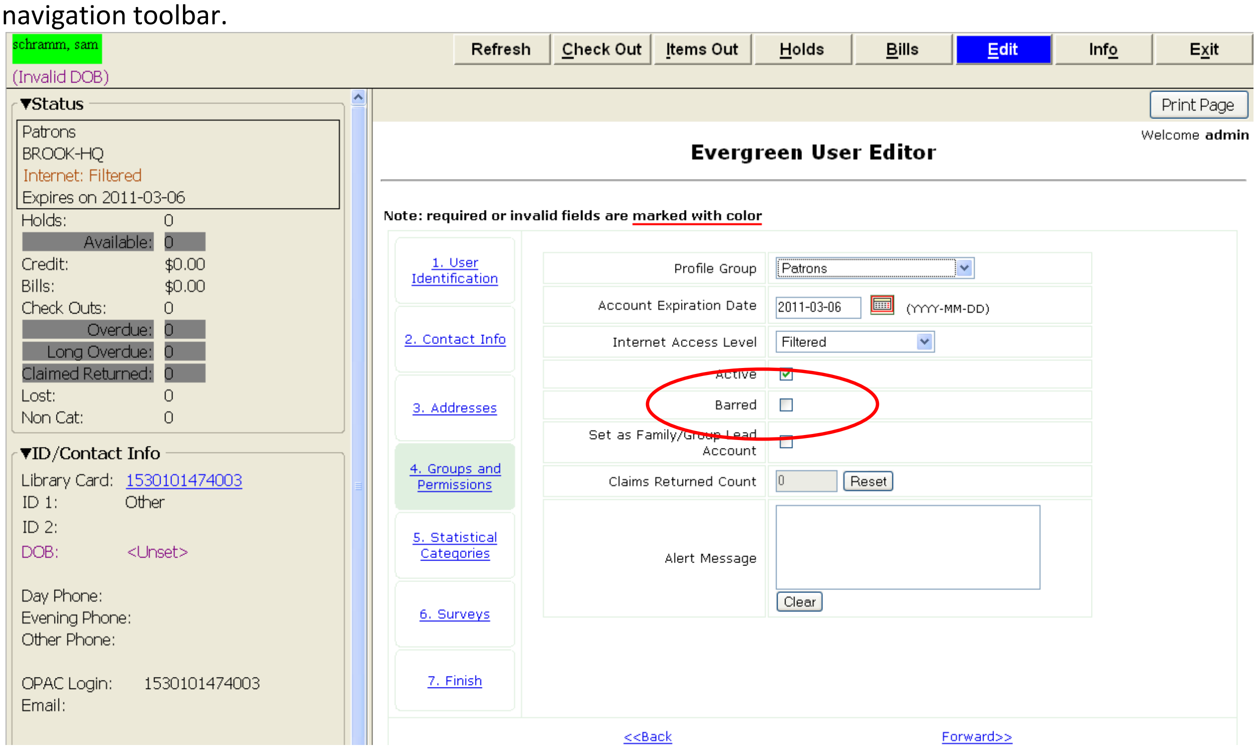
> Reason: The book "***The Last of the Mohicans"*** by James Fenimore Cooper, borrowed on Nov23, 2001 is long over due.
>
> Barring Library: Bluffton Branch (Beaufort County Public Library)
>
> Bar date: 4/12/2002 AR

Figure 58 Example Barred Alert Message text

When a barred customer tries to place a hold, they receive an alert telling them they are barred, and directing them to see Staff Notes in their "My Account" page or to contact their local library. Customers cannot be barred or unbarred systematically. A staff member must go in manually from within the Customer record to bar and unbar the Customer.

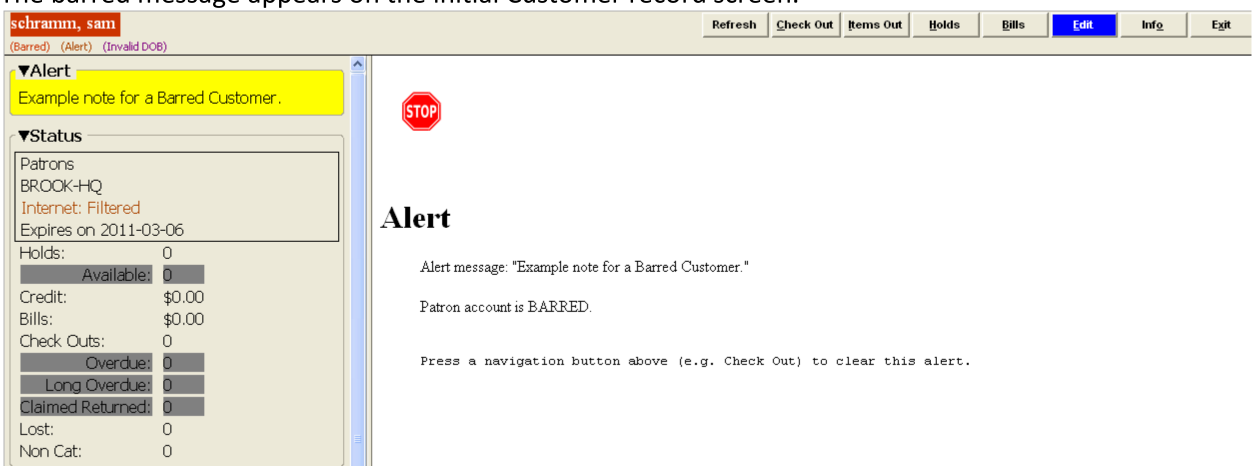
Bar a Customer

To bar a Customer, retrieve the Customer record and click on the *Edit* command button on the navigation toolbar.



The *User Editor* appears. Click on the *Groups and Permissions* section.
Click on the box labeled *Barred* to check it.
The system will prompt for entry of an alert message explaining why the Customer was barred refers to example Alert Message in Figure 58.

(This Alert Message will appear whenever the customer record is accessed.)
Click on *Finish*. Click on *Save User*. Click on *OK*.
The barred message appears on the initial Customer record screen.



Unbar a Customer

To unbar a Customer, you would use a similar procedure as above:

- Go to the Evergreen User Editor by clicking on the *Edit* command button on the navigation toolbar associated with the customer record.
- Click on *Groups and Permissions* section.
- Uncheck the box labeled *Barred*.
- Click on the *Clear* button beneath the box labeled *Alert message* or if there is other text to be retained edit out the barred message.
- Click on *Finish*.
- Click on *Save User*.
- Click on *OK*.

The Customer record screen refreshes and the alerts are gone.

Chapter 3 Common Circulation Tasks

Circulation Basics

Library cards must be presented for checking out materials, placing holds and for using the Internet.

COWCRD

A customer may check out without their library card upon showing a drivers license or some form of ID. If a person has no ID, the staff will ask them to confirm their Alt ID or phone number and address. If a customer is able to prove their identity, then an *Alert Message* is placed in the person's record indicating they checked out without their card. The Alert message consists of the phrase *Checked-Out Without a Card* abbreviated as COWCRD followed by the entry Date, system initials, branch initials, and staff initials, e.g., COWCRD 2009-04-23, BCL, BLU, ps. The next time the person comes in with their card, the Alert is removed, or if the person comes in without their card, the card is treated as lost and must be replaced.

POWCRD

A customer is allowed to retrieve material for a friend or relative **one time** without a designated borrower entry. If this happens staff will indicate in the *Alert Message* field of the person who the material was retrieved for, POWCRD (i.e., Permission W/O Card) followed by the entry Date, system initials, branch initials, and staff initials, e.g., POWCRD 2009-04-23, BCL, BLU, ps. After a POWCRD appears on a customer record only the customer who is assigned the card can check out materials, pay bills etc. until they have designated a borrower for their account. The note should be deleted when the customer has a valid designated borrower entry.

Understanding Customer Status

Customers in good standing with their home library can borrow from the consortium. Customers above the fine or overdue limit within their home library system will be blocked from borrowing from all SC LENDS libraries regardless of the fine or overdue limits of the other library systems. On the customer record screen, the customer name appears at the top left (Figure 59). The customer's status is reflected in the particular background color in the name field.

- Green indicates that the customer is in good standing, with no fines, bills, over dues, or alerts (other than a holds alert).
- Yellow indicates that there is an alert (other than a holds alert) on the record. The alert also shows up beneath the customer name in the *Alert* field with a yellow background. Notice that in this example (Figure 60) the customer also has bills (shown as a Note flag).
- Peach indicates that the customer has fines or bills (Figure 60
- Red indicates that the customer has been barred from using the library (Figure 62).
- Dark gray (it really looks black) indicates the customer's card has EXPIRED (or expires today).

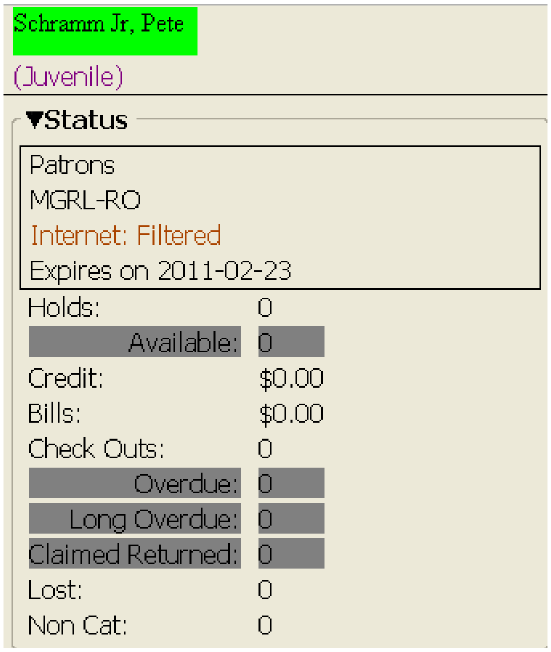


Figure 59 Normal customer Status (Green)

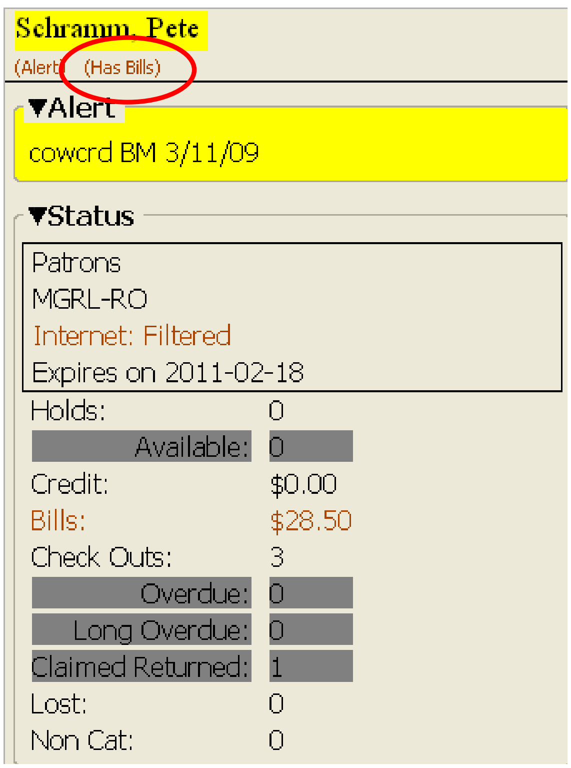


Figure 60 Bills Customer Status (Yellow)

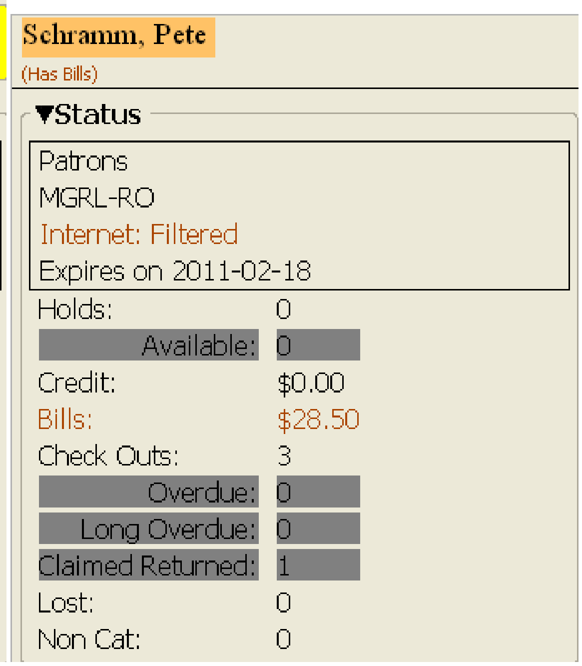


Figure 61 Alert Customer Status (Orange)

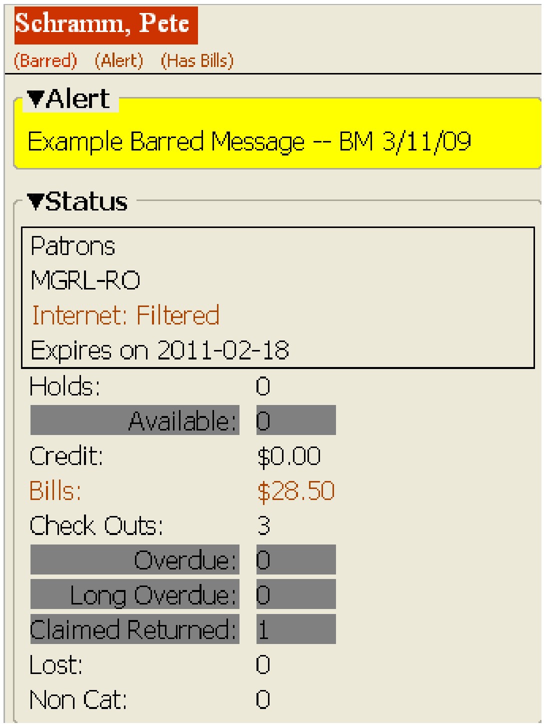
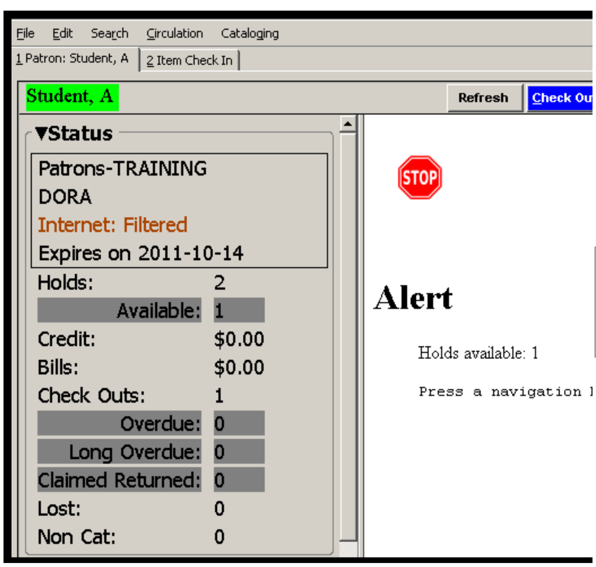


Figure 62 Barred Customer Status (Red)

Checkout Alerts

Alerts at checkout can indicate something about the customer, for example, the customer has too many items checked out, or has reached the limit of items that can be reserved.
Other types of alerts include notes that customer has available holds waiting for checkout (Figure 63).

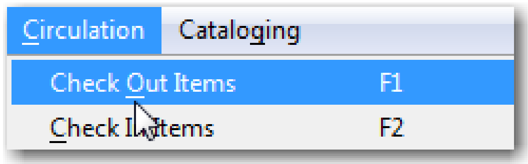


If a customer record has an alert, it will display in yellow beneath the name.

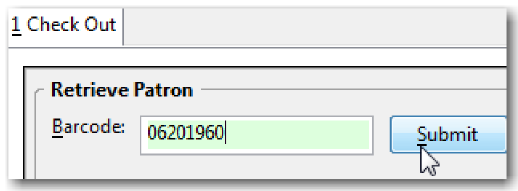
Figure 63 Hold Alert massage (system generated)

Check Out (F1)

SC LENDS customers will be able to walk into any SC LENDS library and check out materials. They can also return items to any SC LENDS library. To check out an item press **F1** or select ***Circulation > Check Out Items***.



Scan or enter customer's barcode and, if entering barcode manually, click *Submit*. To check out materials without the customer's library card, search for an individual customer by name, address, or other fields (and be sure to enter a COWCRD Alert Message—see page57). Searching for a customer record is covered in "Modify Customer records" page 46.



Check to make sure there are no customer *Notes,* or *Alerts* on the record. For example, if the customer had previously checked out an item without their card then an *Alert* indicator should appear on the customer's summary record and a red *Stop* sign is displayed when the record is retrieved.

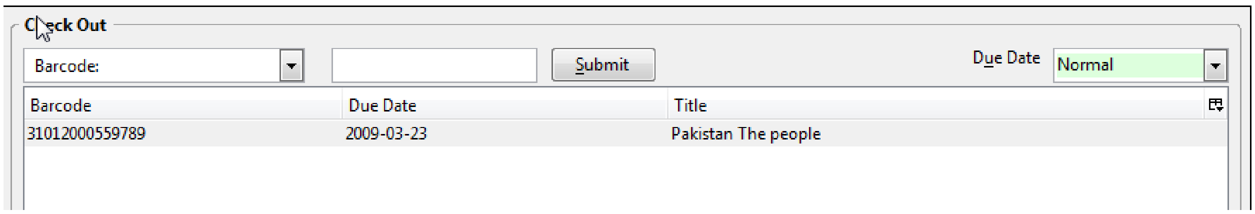
Figure 64 Alert message appearing at Check Out

Refer to the *Alert* field to see the specific comment.

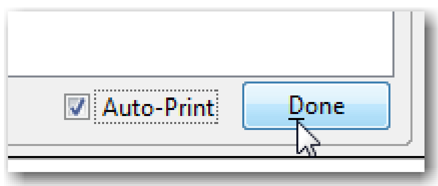
Make sure to clear any Alerts not needed on the customer's record by opening the customer's record using the *Edit* command on the toolbar and navigate to Groups and Permissions section of the customer record (Figure 26). Notes can be added or deleted after you press the *Info* command button on the navigation toolbar (Figure 46).

Once you have completed any basic customer record updates, scan the item's barcode, or type the *Item ID* and click *Submit*.

The Select a *Due Date* window (to the right of *Submit*) should be set to Normal (The due date is automatically set according to the library policy for the item type.). The *Due Date* window defaults to Normal, but you can also set an alternate date from the *Due Date* -- dropdown. The due date is now displayed in the list of scanned items that have been successfully checked-out to the customer. To select a custom due date (e.g., a class textbook) use dropdown menu options or enter a custom date in YYYY-MM-DD format. A custom date must be set prior to entering the item's barcode.

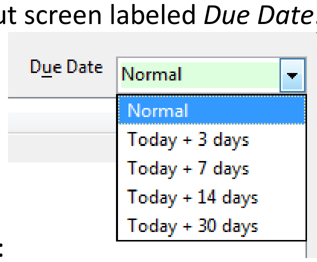


When all items have been checked out, the staff can click on the Print Receipt button at the lower left of the check out screen to print a receipt for the customer. The check out receipt gives a list of the items checked out and their due dates. If the Auto-Print box to the lower right is checked, the receipt is automatically printed.
When finished checking out items for the customer, click on the *Done* button. A new check out screen will appear for the next transaction.
Note: Customers should always be given a receipt showing their due dates. All CIRC stations should have receipt printers attached to their workstations to accommodate automatic printing as the items are scanned.



Modify the Due Date

When checking out an item, staff may need to change the default due date to another date. In order to do this, before scanning the item, click on the box in the upper right hand corner of the checkout screen labeled *Due Date*. There is a dropdown menu that will display the following



choices:
You can further modify the due date by selecting the field and editing the date via keyboard entry. Note the change in due date does not modify an item that has already been scanned. **The *Due Date* modification only applies to future scanned material**.

Overrides

When the system will not allow checkouts of materials to customers, for various reasons, staff have the ability (if warranted and allowed) to override the refusal and continue to check out the material.

For instance if a customer brings to the checkout desk a book that is in transit (Figure 65) the system will display a message that the "Copy is in transit" in the *Check Out Failed* dialog box. In the same message, the system gives staff the option to override this rule and to circulate the book. The override command button is labeled *Abort Transit then Checkout*.

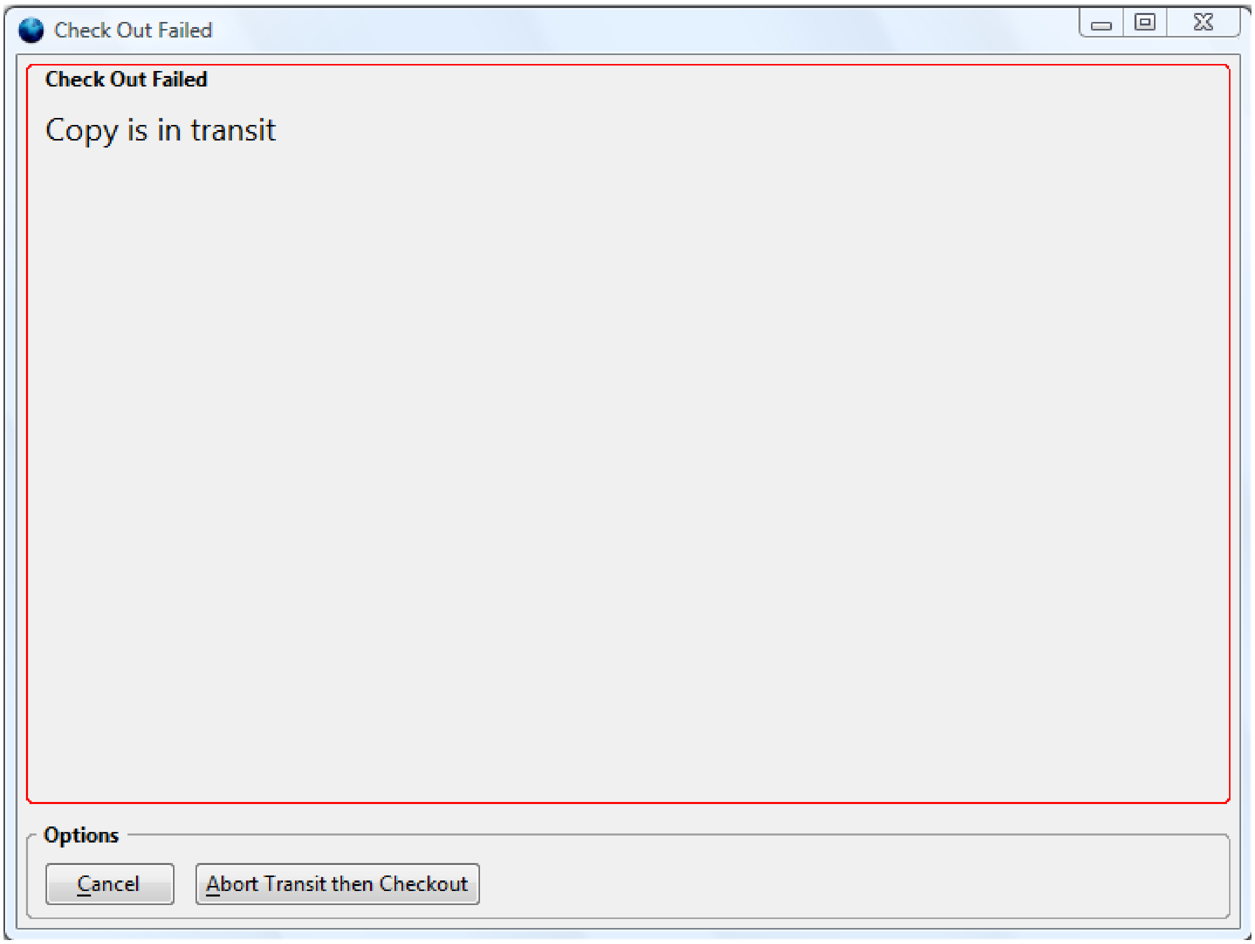


Figure 65 *Copy is in Transit* dialog box

If staff clicks the command button the item will circulate.

Some conditions may also override your request, so make sure to read the screen for messages indicating a failure.

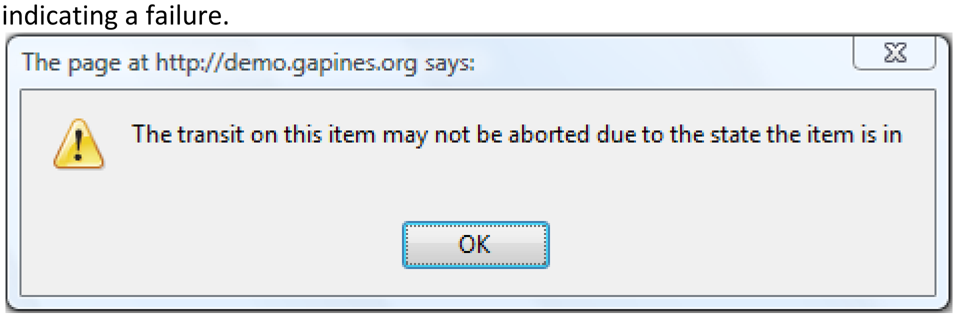


Figure 66 Check Out Failure cannot be overridden

Checking out to a Customer Who's Card is about to Expire

If a customer's card is **about** to expire, there is **no** notification given the staff member upon card use. If the customer's card has **expired** (or expires today) you'll see the customer name background as dark gray (it really looks black).When you access the customer record, Evergreen generates a *Patron is EXPIRED* alert message. If you try to check out something to the customer anyway, you'll see the following dialog box:

Until the account expiration date is updated, you cannot circulate something to the customer. There is no "override" for this. See section Renew Customer's Privilege page 50.

Checking out Magazines and Paperbacks

You can use this check out for items such as paperbacks or magazines that you may not care if the customer returns them or not. Items are checked out with a due date but when the due date expires, the item disappears from the customer's record and no fines accrue. Circulation statistics are collected.

To use non-catalogued item function, click on the drop-down list in *Barcode* and choose the type of non-catalogued item (Figure 67). As there is no barcode the barcode window is grayed out, but you must click *Submit*.

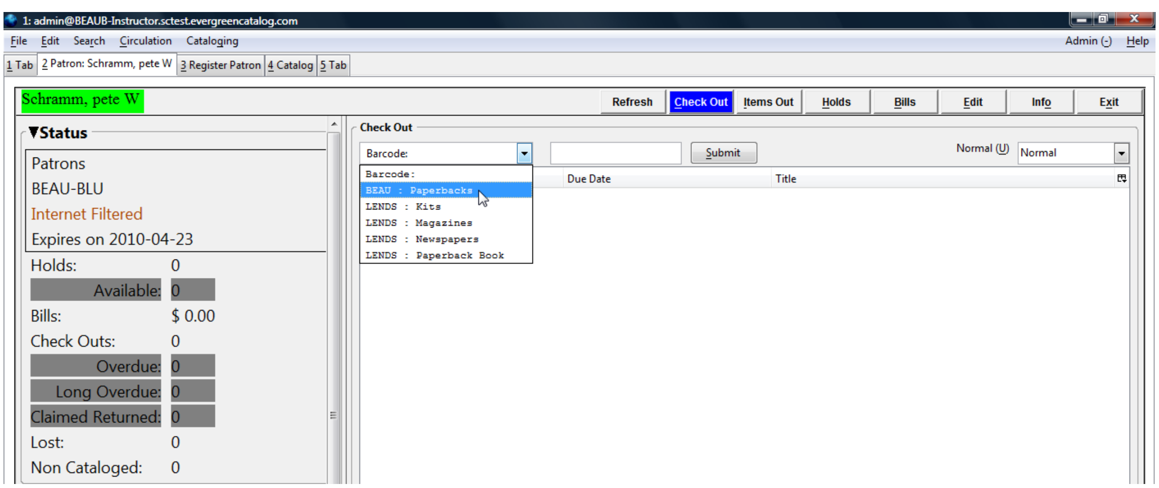


Figure 67 Magazine Check out

As shown in

Figure 68, enter the number of items being circulated and click *OK*. The items checked out list will show an entry for each item including the type and due date (Figure 69).

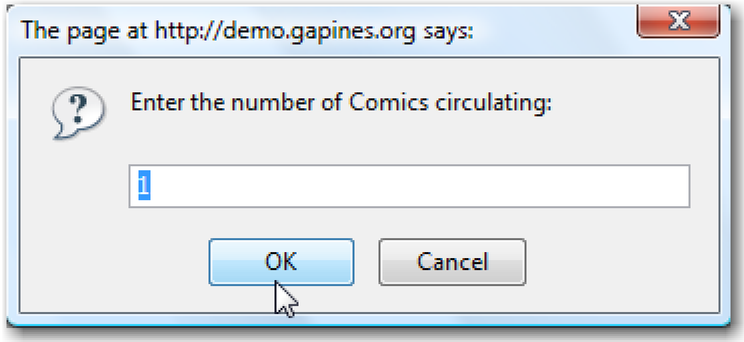


Figure 68 Number on non cataloged items being Checked Out

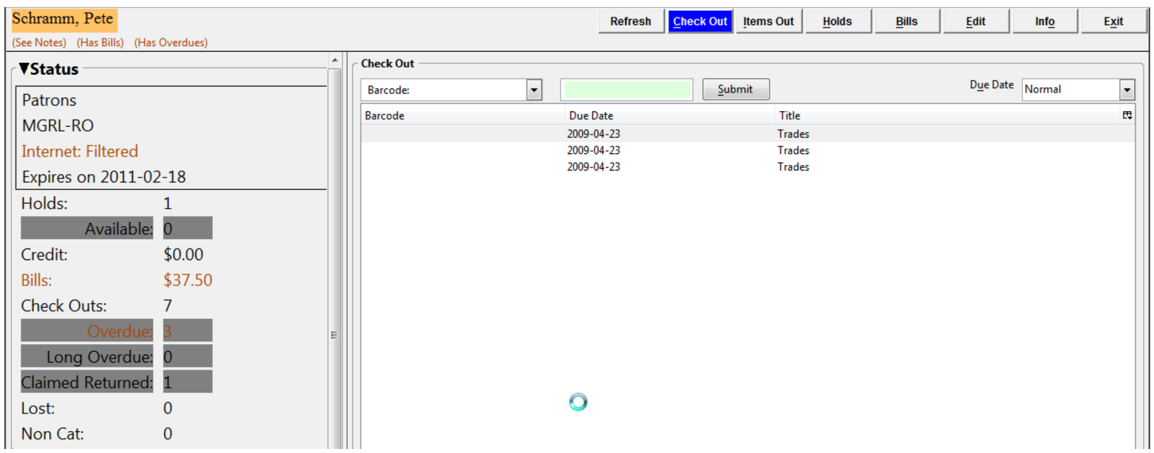


Figure 69 Checked Out Magazine item list

Referring to Figure 70 you can see that the magazines are checked out to the customer's account, but you must click on the command button *Show Non-Cataloged Circulations in List Above* at the lower left corner of the *Items Out* pane in order for Evergreen to display these items.

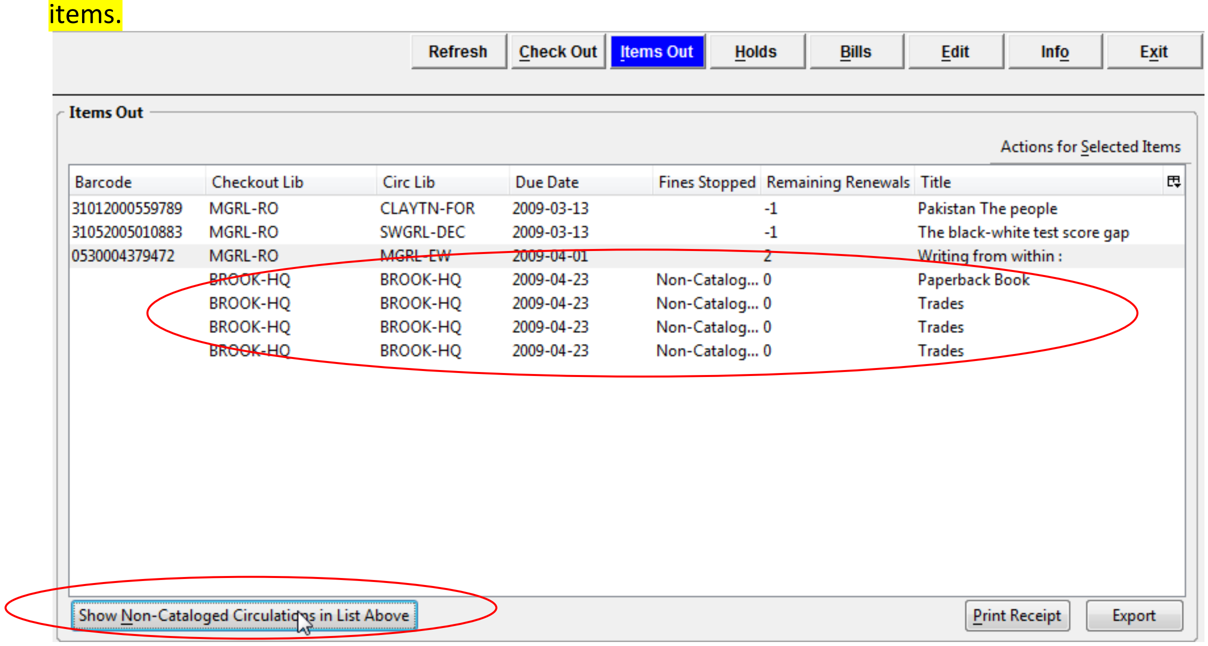


Figure 70 Reviewing Magazines that checked out

Checking out ILL Material

All ILL checkouts must be corrected for the due date required; otherwise, if the default date is later then the ILL return date, the customer will be charged for a late return.

Set the due date using the Modify Due Date procedure page 61. Before scanning the item, click on the box in the upper right hand corner of the checkout screen labeled *Due Date*. You will need to modify the due date by selecting the field and editing the date via keyboard entry. The *Due Date* modification only applies to future scanned material.

The return date set should match what is written on the ILL sleeve attached to the front of the material. Scan the barcode attached to the book.

If the customer has additional library material you will need to reset the Due Date window back to *Normal* before scanning any additional material.

Make sure you place the colored ILL card into due date file (sorted by date due) so that the item can be checked-in upon return to the Library.

Checking out slightly damaged material

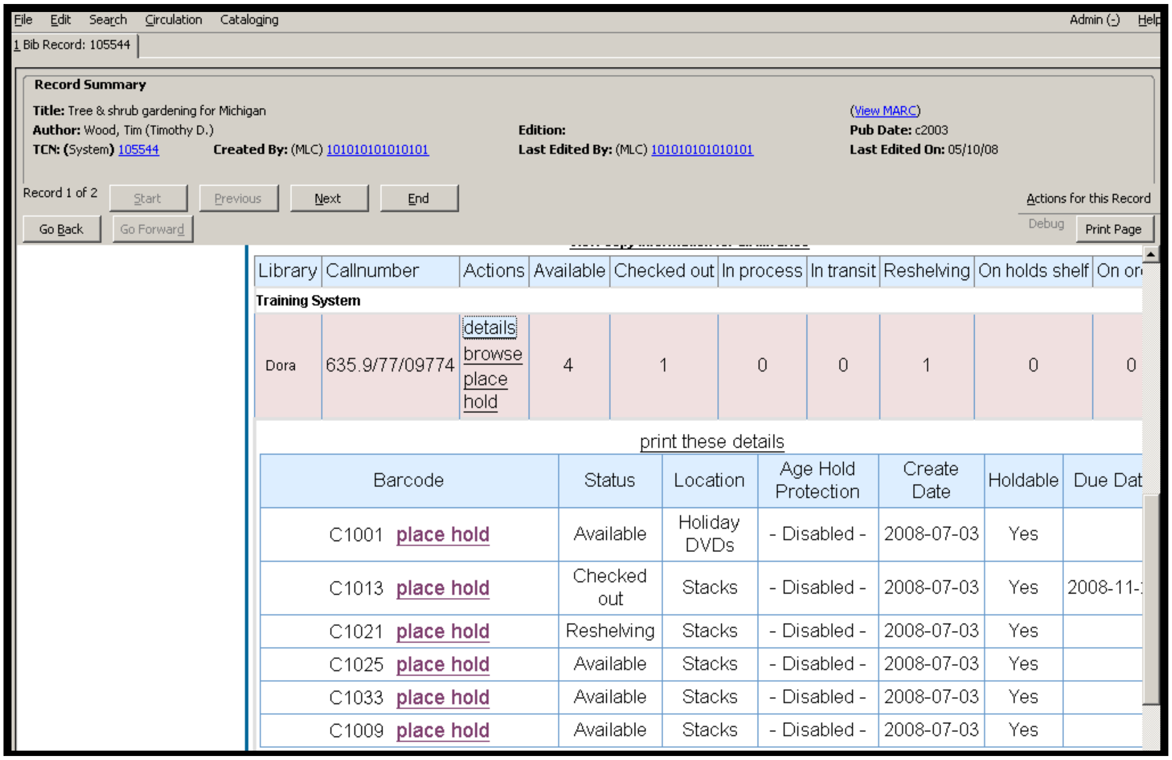
Material that has not already been sent to repair will sometimes appear for checkout by a customer. Books with loose pages or broken spines *should not be circulated* until they are repaired.

Material damage that is allowed to be checked out includes water spots, loose date card envelopes, torn pages, scribbled entries, and damaged media cases. Damage should be noted on a piece of paper and affixed below the item's barcode. Date it, and initial the note. This procedure will avoid the problem of the customer being charged a fine (on return) for prior damage.

Once the item is returned to the library, the item should be either sent to repair, or replace the damage note with a permanent note in the book.

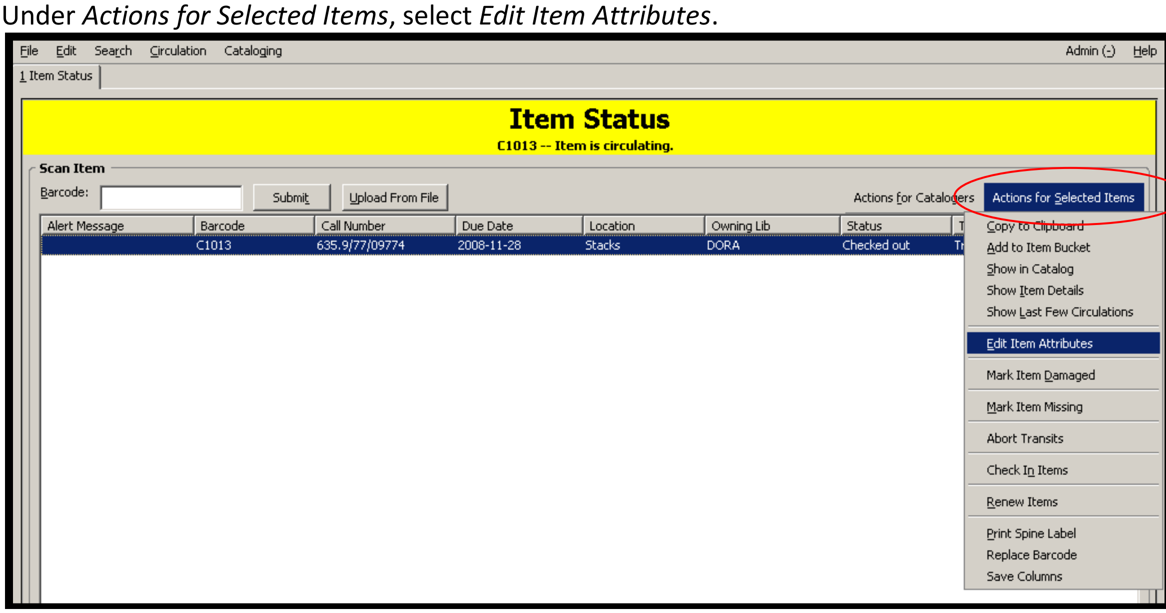
A good practice to follow, in checking out slightly damaged material, is to add an alert message to the item stating that the item was damaged and must be returned to processing upon check in and to make the item non-holdable so that it cannot be recaptured for a hold when the item is returned.

Search the title and retrieve the copy *details*.

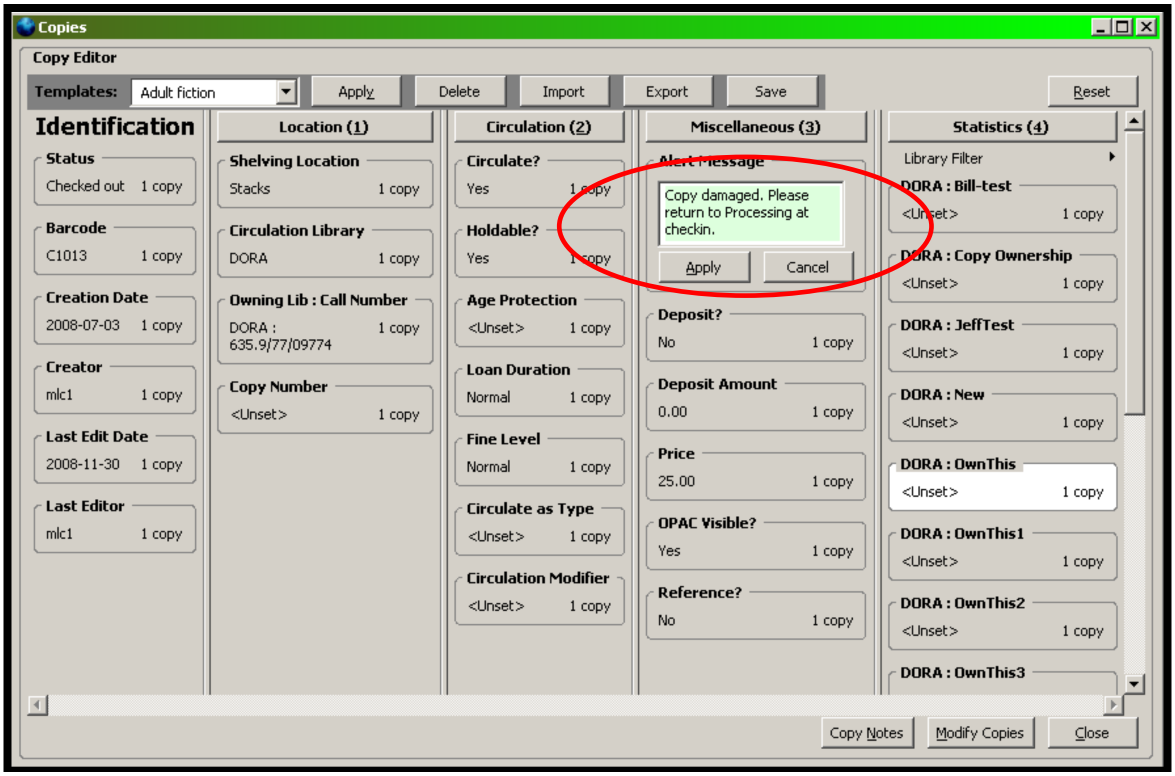


Go to the *Circulation* menu and select *Show Item Status by Barcode*

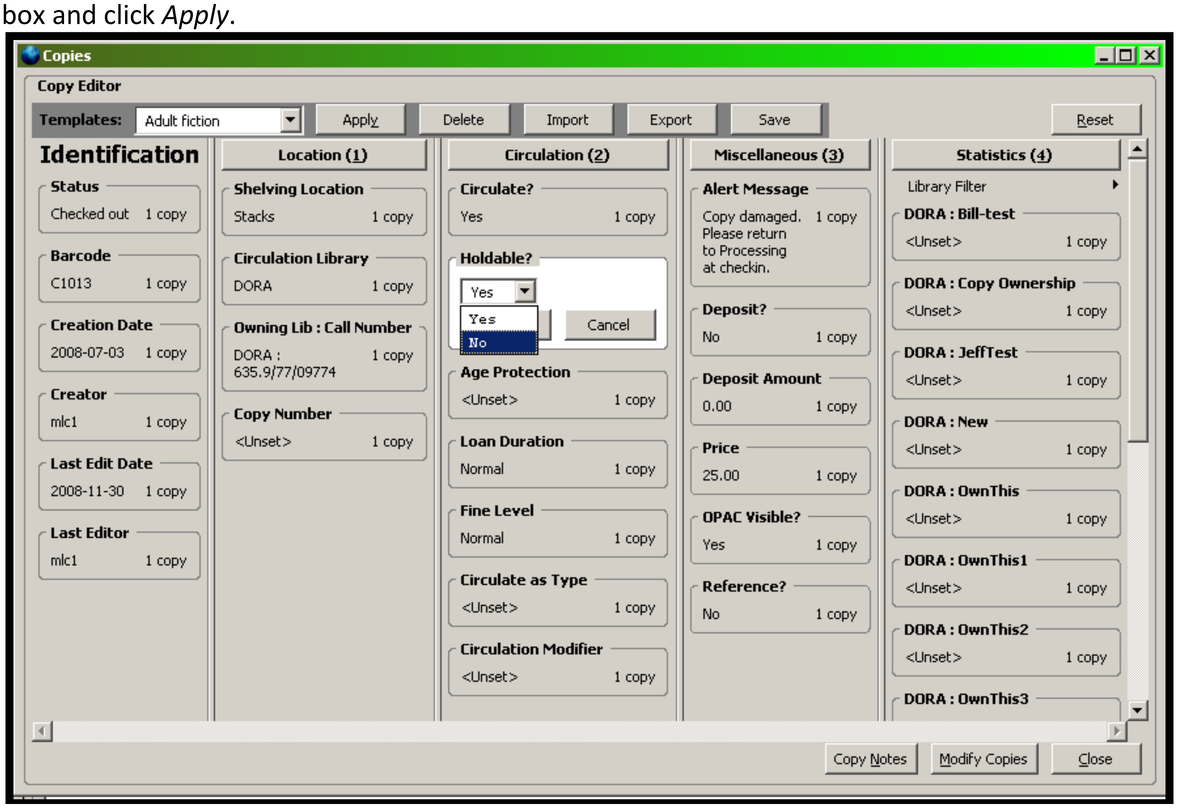
Under *Actions for Selected Items*, select *Edit Item Attributes*.



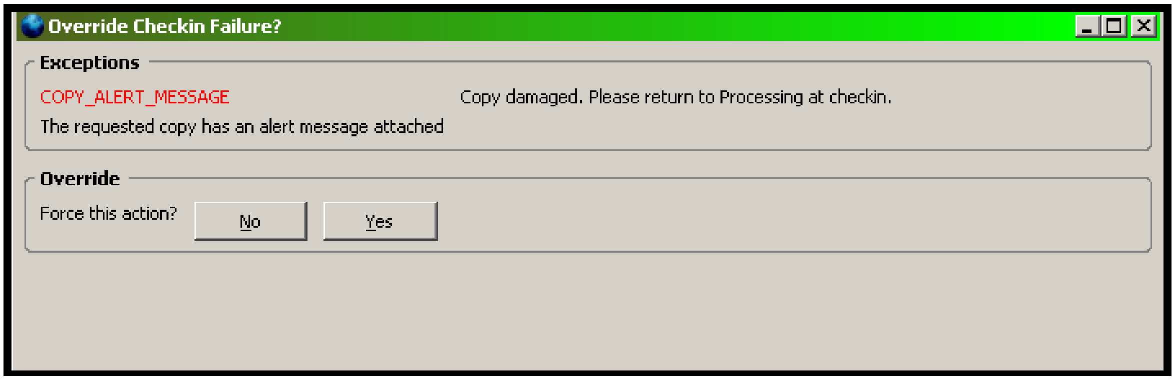
The *Copy Editor* screen appears. Add the *Alert Message* and click *Apply*



From the *Holdable* control box make the item unholdable by selecting *No* from the drop down box and click *Apply*.



When the item is checked in an Alert message appears at check in.



Processing Repair items

Material that can be repaired should be returned to the branch location along with a note describing the condition that needs correction and staff initials/date. Check in the item. Now highlight the item on the Discharge window and from the *Actions for Selected Items* drop down list (Figure 71)select *Mark Item Damaged*. Then return to the *Actions for Selected Items* drop down and select *Edit Item Attributes* (Figure 72).Click on the following boxes (Figure 73):

- Alert Message--Enter a note that the item is being sent to repair, initial, and date. Click on *Apply*.
- Circulate?—change to No, click on *Apply*.
- Holdable?—Change to No, click on *Apply*.
- OPEC Visible?—Change to No, click on *Apply*

Save changes by clicking on Modify Copies!

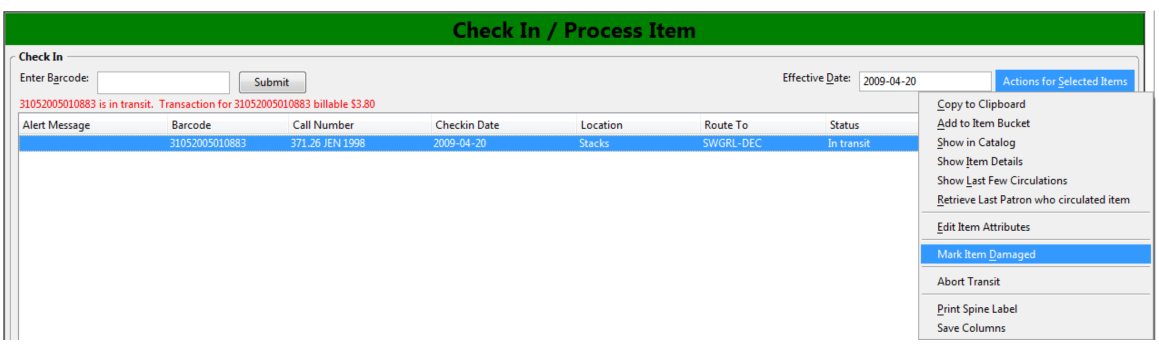


Figure 71 Mark Item Damaged

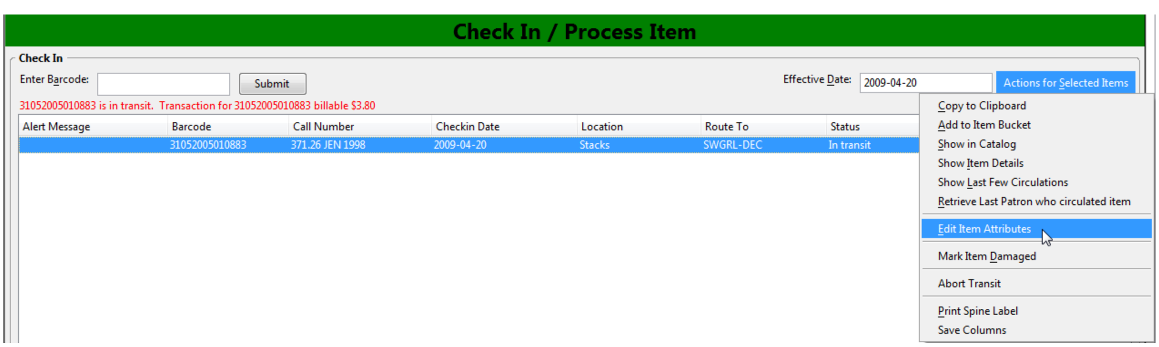


Figure 72 Edit Item Attributes

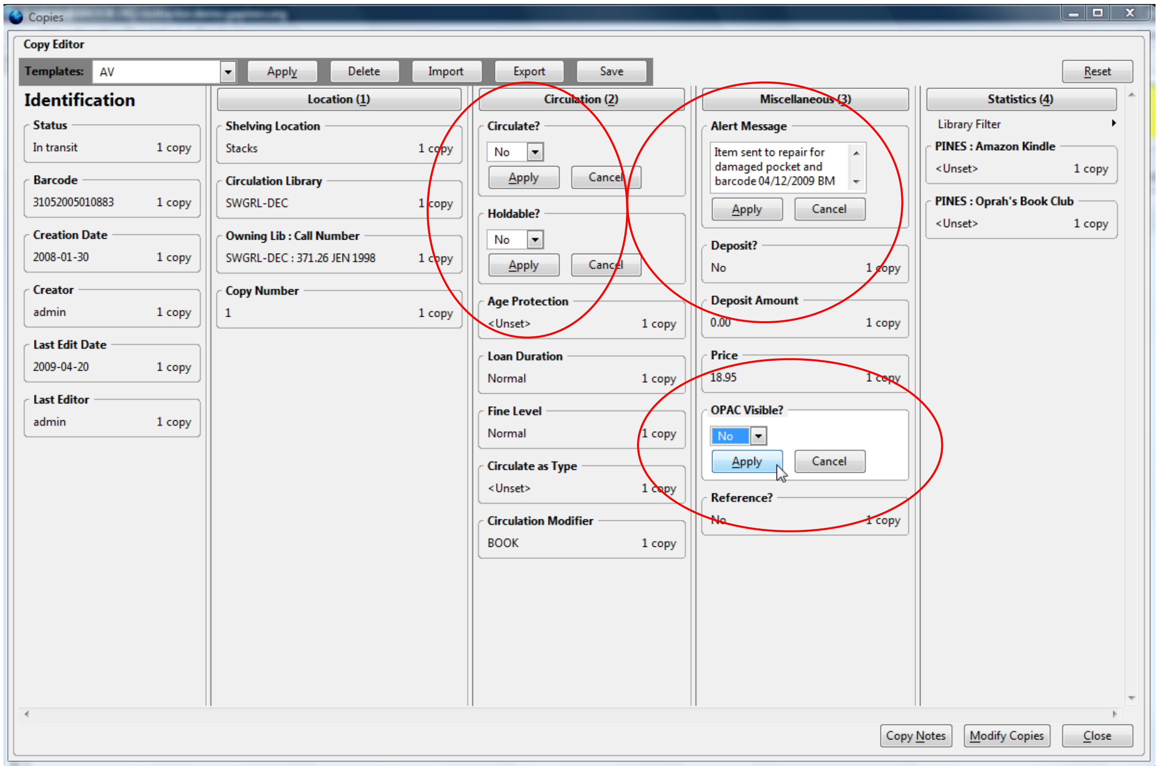


Figure 73 Modify attributes of Damaged Item

The item is then placed on the branch repair shelf.

The item once restored, is cleared of the item attribute changes just described and returned to its home location.

Note this same process of marking an item for repair can also be accessed from the ***Circulation > Show Item Status by Barcode*** window.

If you need to bill a customer for the damage, you will have to manually retrieve the last circulation record (page 142).

Checking out to Discard

Materials being removed from the collection due to damage, age/old information, or return of lease items are managed in this manner.

Use the Checkout with a User ID of Discard to checkout withdrawn items to this System user.

Use override for any items already checked out (to Missing, or another customer).

- If the item was charged to a customer, any fines created should be forgiven.
- Holds on any withdrawn items will also be identified when checking out to Discard.
    - Holds should be investigated to determine if there are other copies to satisfy a hold.
    - If no other copies exist, the copy should not be withdrawn but instead make it available for the hold, and add a hold placed for Discard so the item can be withdrawn when it returns. Put a comment (discard this item when returned) in the hold request, giving as the reason for the hold, and date/initial your entry.
  - If unable to satisfy hold, due to condition, then refer the hold information to the reference librarian, or branch librarian for further action.

In order to finalize the material for discard use a Sharpie marker to strike a line through the barcode of the book. Strike a line through any library name on the end pages if applicable Using a DISCARD stamp – stamp DISCARD on the book pocket and the library address on the title page.

View Check Out Information from the User Record

Here is a quick way to display detailed information about the items a customer has checked out while viewing the user record.
Press *F1* or click ***Circulation > Check Out Items***
Retrieve the customer by scanning or typing their library card number into the green box and clicking *Submit* or press the *Enter* key. Scanned library card numbers do not require a *Submit* or Enter key.
From within the customer record, click *Items Out* on the navigation bar (Figure 70).
If a customer's library card number is unavailable, see Searching for Customers.
You must click on the command button *Show Non-Cataloged Circulations in List Above* at the lower left corner of the *Items Out* pane in order for Evergreen to display items checked out that are non-cataloged (e.g., magazines).

Modify Due Dates

Use *Actions for Selected Items* to change a due date after an item has been checked out. For example, you may want to extend an item's due date if the user is not able to return the materials on time.

To change a due date

To Change due dates after an item is checked out press *F1* or click ***Circulation >Check Out Items***
Retrieve the customer by scanning or typing their library card number into the green box and clicking *Submit* or press the *Enter* key.
From within the customer record, click *Items Out* on the navigation bar.
If a customer's library card number is unavailable, see Searching for Customers.

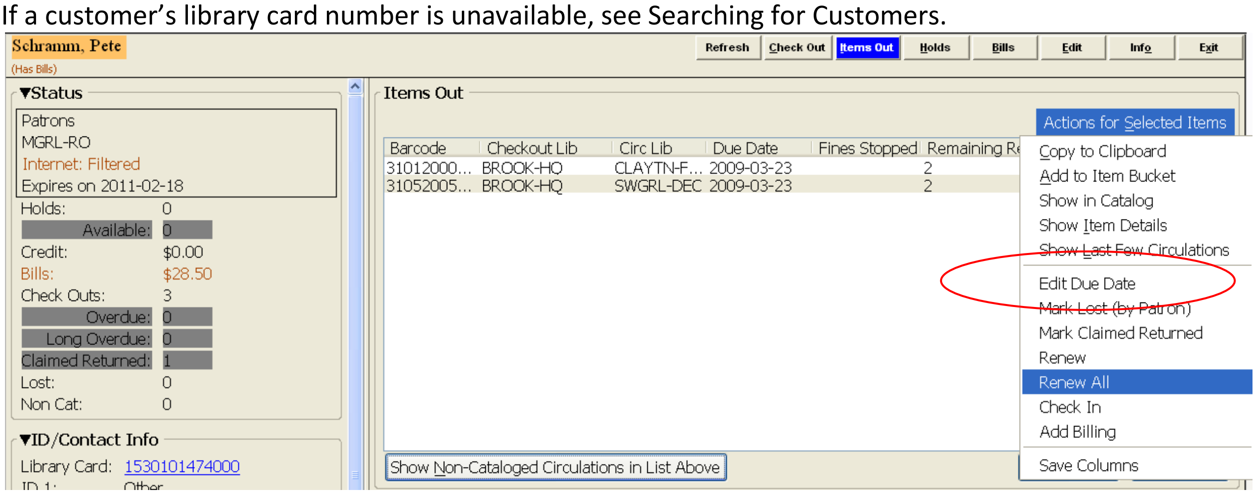


Figure 74 Renewing items for a customer

Select item(s) to renew from the list of items the customer has checked out.

- Use **Shift+Click** to select multiple adjacent items.
- Use **Ctrl+Click** will select multiple non-adjacent items.
- *Actions for Selected Items* offers a list of actions including *Edit Due Date (*Figure 74).

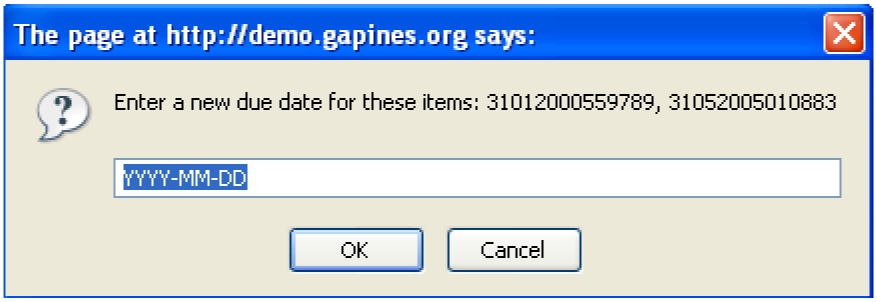
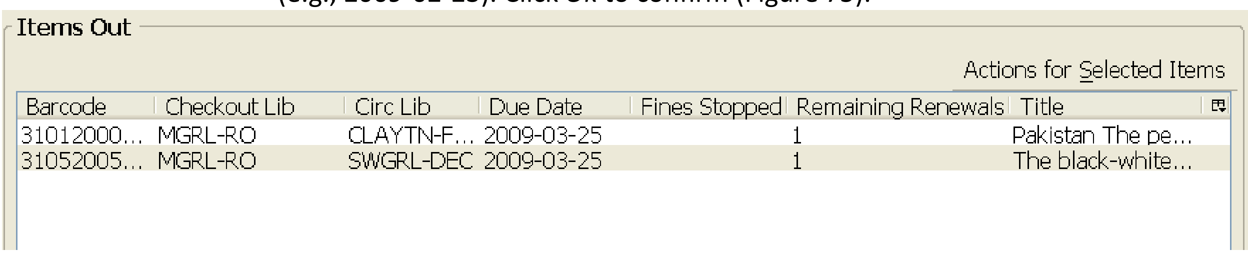


Figure 75 Renew Items Dialog box

Enter the new due date(s) in the required format of 4-digit year, 2-digit month and 2digit day (e.g., 2009-02-23). Click *Ok* to confirm (Figure 75).



The *Items Out* list is refreshed showing the revised Due Dates.
Overdue items can be modified, and any fines are added to the customer's record.
Click *Print Receipt* and Evergreen will generate a new customer receipt.
Clicking Exit on the navigation toolbar closes the customer's record but does not print a receipt.

Renewals

You can renew checked out items, up to their limit which, for most items, is twice. When appropriate, it is also possible for staff to override the renewal limit.
To renew items press ***F1*** or click ***Circulation >Check Out Items***
Retrieve the customer by scanning or typing their library card number into the green box and clicking *Submit* or press the *Enter* key. Scanned library card numbers do not require the *Submit* or *Enter* key
From within the customer record, click *Items Out* on the navigation bar.
If a customer's library card number is unavailable, see Searching for Customers.

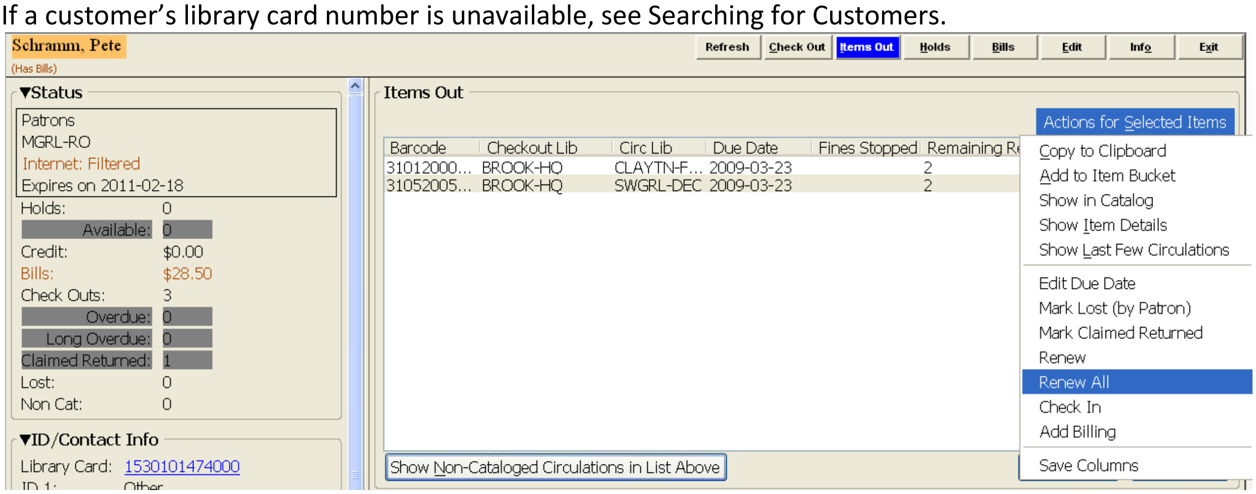
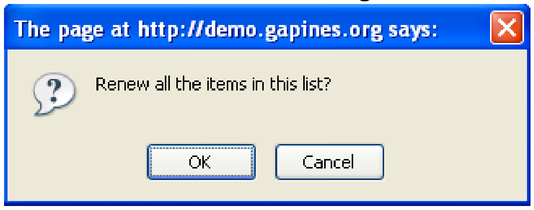


Figure 76 Renew All Customer Items

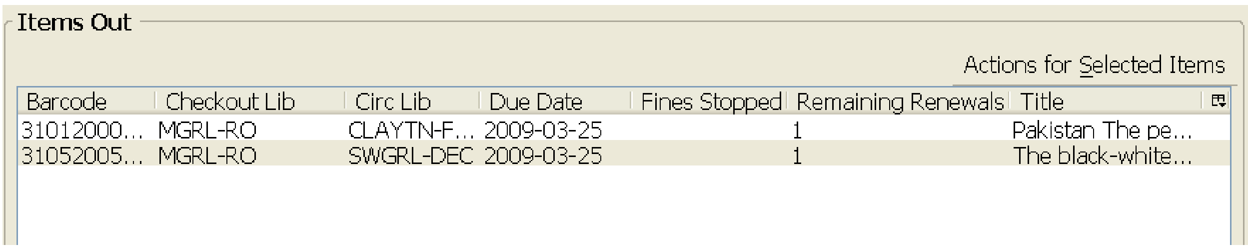
Select item(s) to renew from the list of items the customer has checked out.

- Use **Shift+Click** to select multiple adjacent items.
- Use **Ctrl+Click** to select multiple non-adjacent items.

Actions for Selected Items offers a list of actions including *Renew* and *Renew All* (Figure 76).



Click *Ok* to confirm.



The *Items Out* list is refreshed showing the Due Dates and Remaining Renewals.

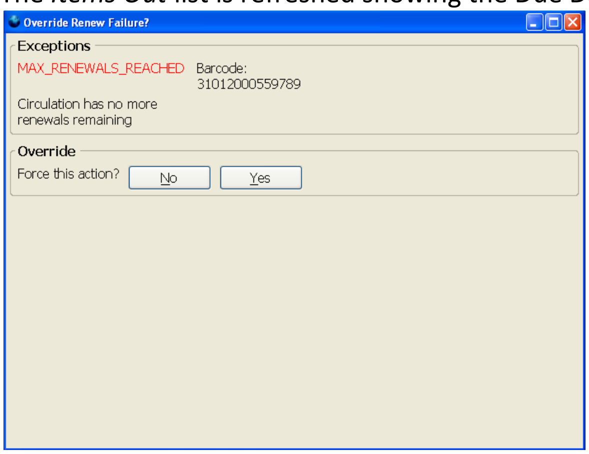


Figure 77 Items not automatically renewed

If the customer has already renewed the item the maximum number of times, Evergreen alerts you and offers the option to override the limit (Figure 77).

Overdue items can be renewed, and any fines are added to the customer's record.

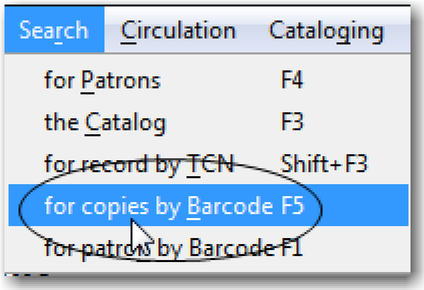
Click *Print Receipt* for a new customer receipt.

Clicking Exit on the navigation toolbar closes the customer's record but does not print a receipt.

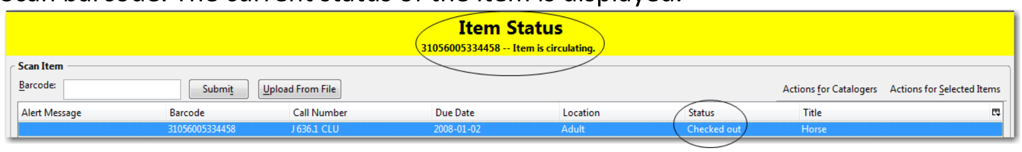
Item status (F5)

To check the status of an item[7], select ***Search > for copies by Barcode*** or press **F5**.

[7] **Cataloging > Display Item** is an equivalent command.



Scan barcode. The current status of the item is displayed.



Viewing past circulations

To view past circulations, either go to *Item Status* as described above, or select item from within a customer record, and select ***Actions for Selected Items > Show Last Few Circulations***. Or select *Show Item Details* from the *Actions for Selected Items* (or right click the item to display the same menu of options).

The item's recent circulation history is displayed (Figure 78).

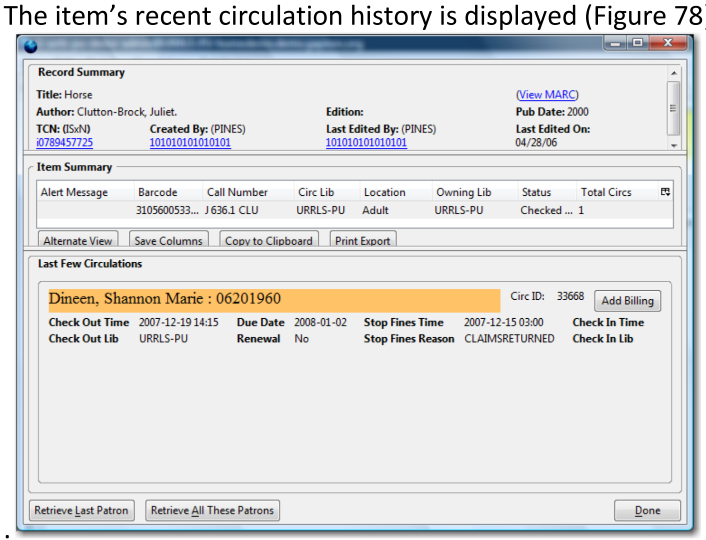


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Figure 78 Past Item Circulations

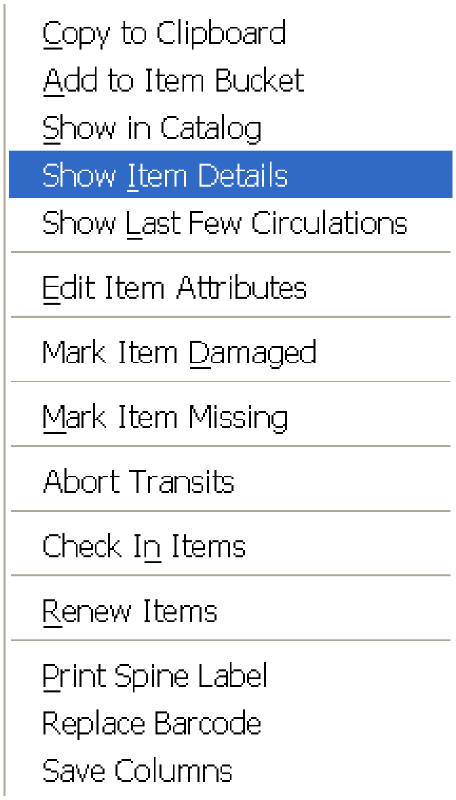


Figure 79 Show Last Few Circulations window

From the Show Last Few Circulations windows Evergreen displays up to the last 4 borrowers.

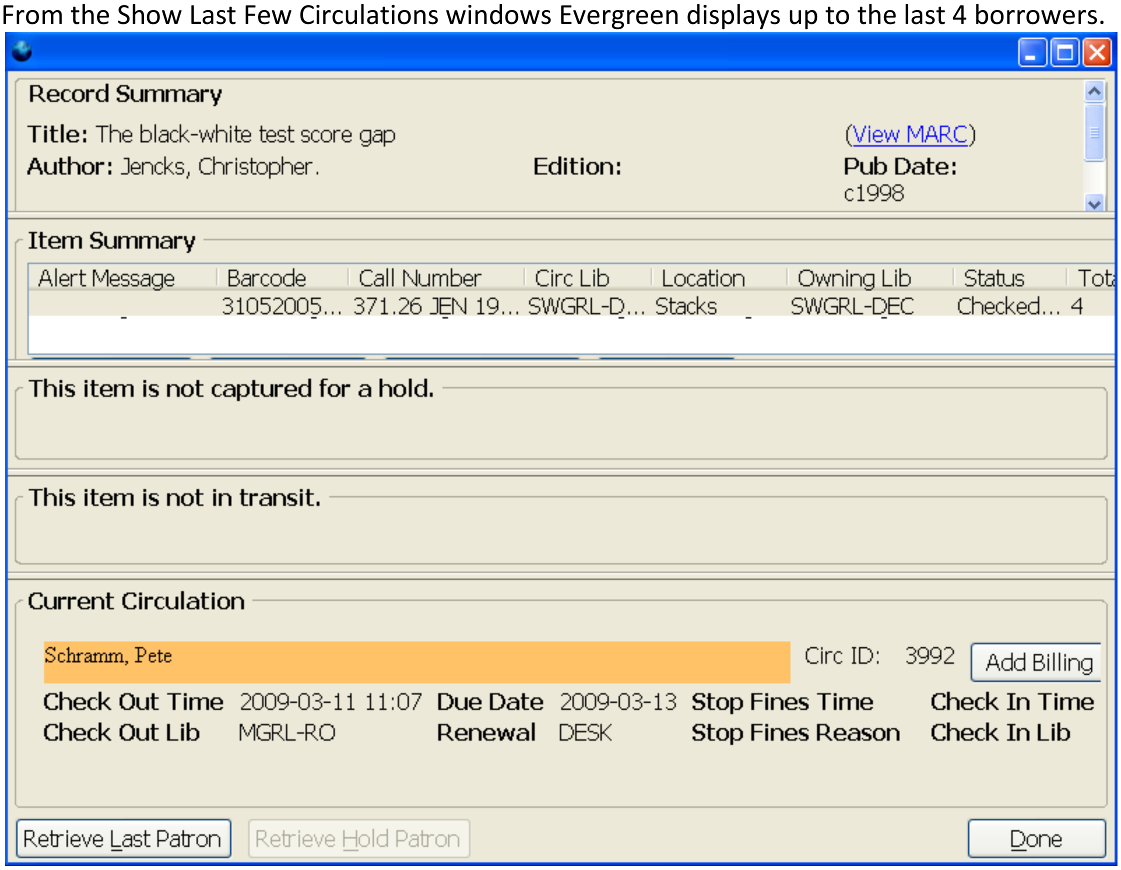


Figure 80 Show item details window

Check in/Discharge Procedures

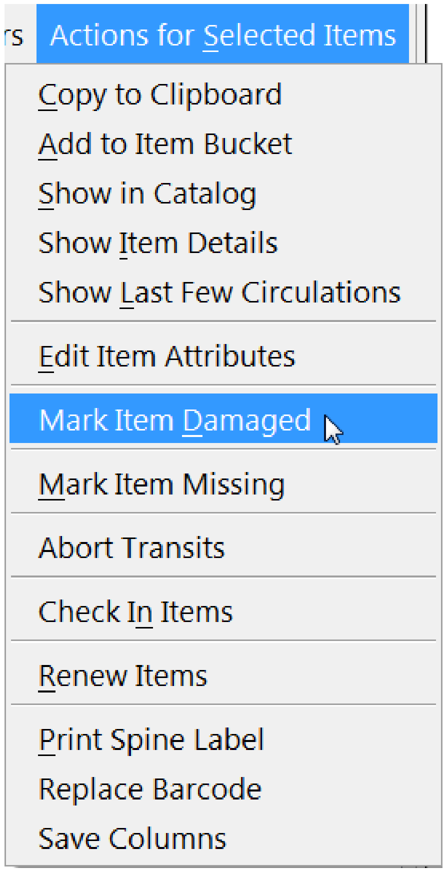
SC LENDS customers will be able to walk into any SC LENDS library return SC LENDS.
Always check contents of audio/video boxes as well as the condition of items before discharging. Evergreen will usually popup a message showing the contents of the box and will require an override to proceed with discharge. Check to make sure the contents of the box match in terms of the title and the number of items.

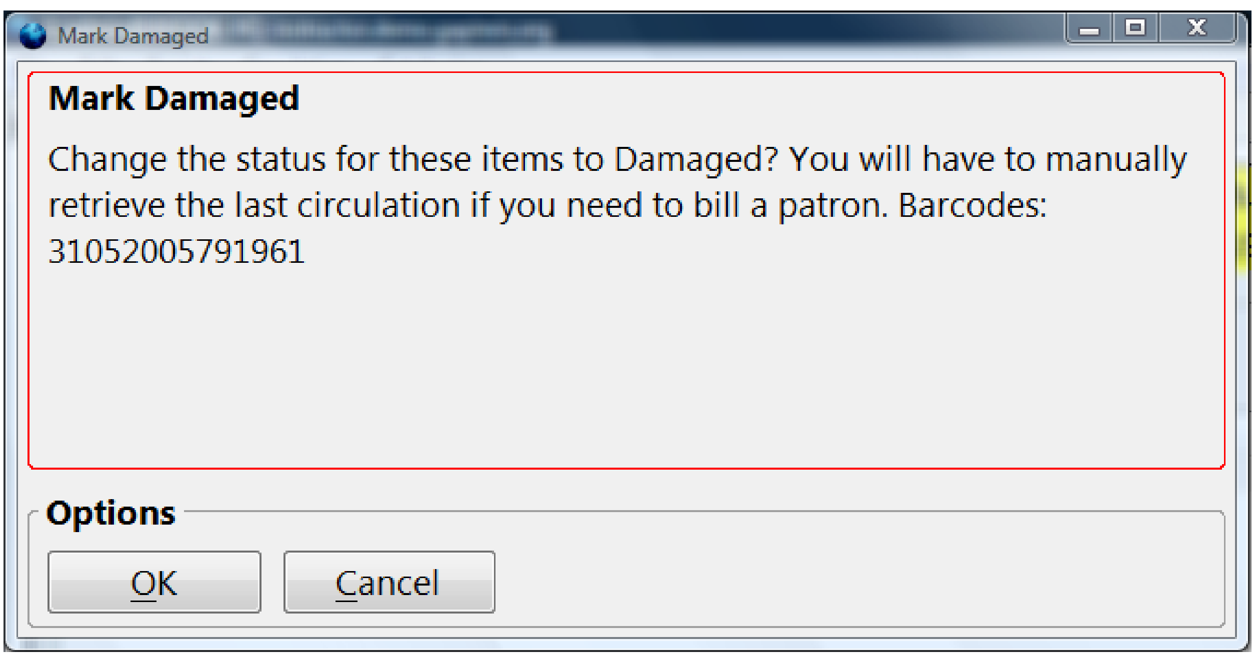
Missing Contents

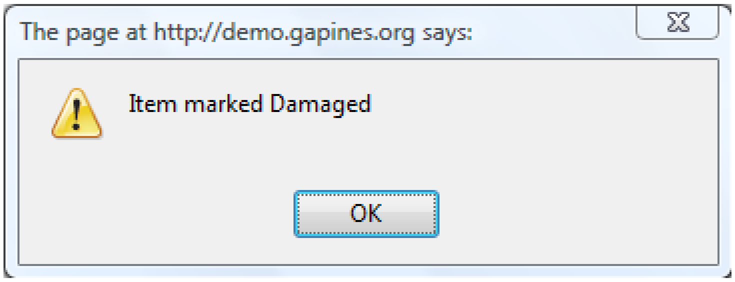
Mismatches should not be discharged. Instead Staff should fill out a library Problem Tag including pertinent information such as the user ID, name and phone number, item title, bar code number and description of the problem. If the customer is not at the circulation desk a call should be made alerting the customer of the problem. Also notify them that the item will remain checked out until all of the items are returned (possibly accumulating fines). Make sure you date and initial the Problem Tag, enter an *Alert* message of the problem in the customer's account record, and place the item on the branch problem shelf. If the item belongs to another branch send the item in the transit box along with the Problem Tag.
When the material items are returned the *Alert* message in the customer record should be deleted and the material discharged and shelved.

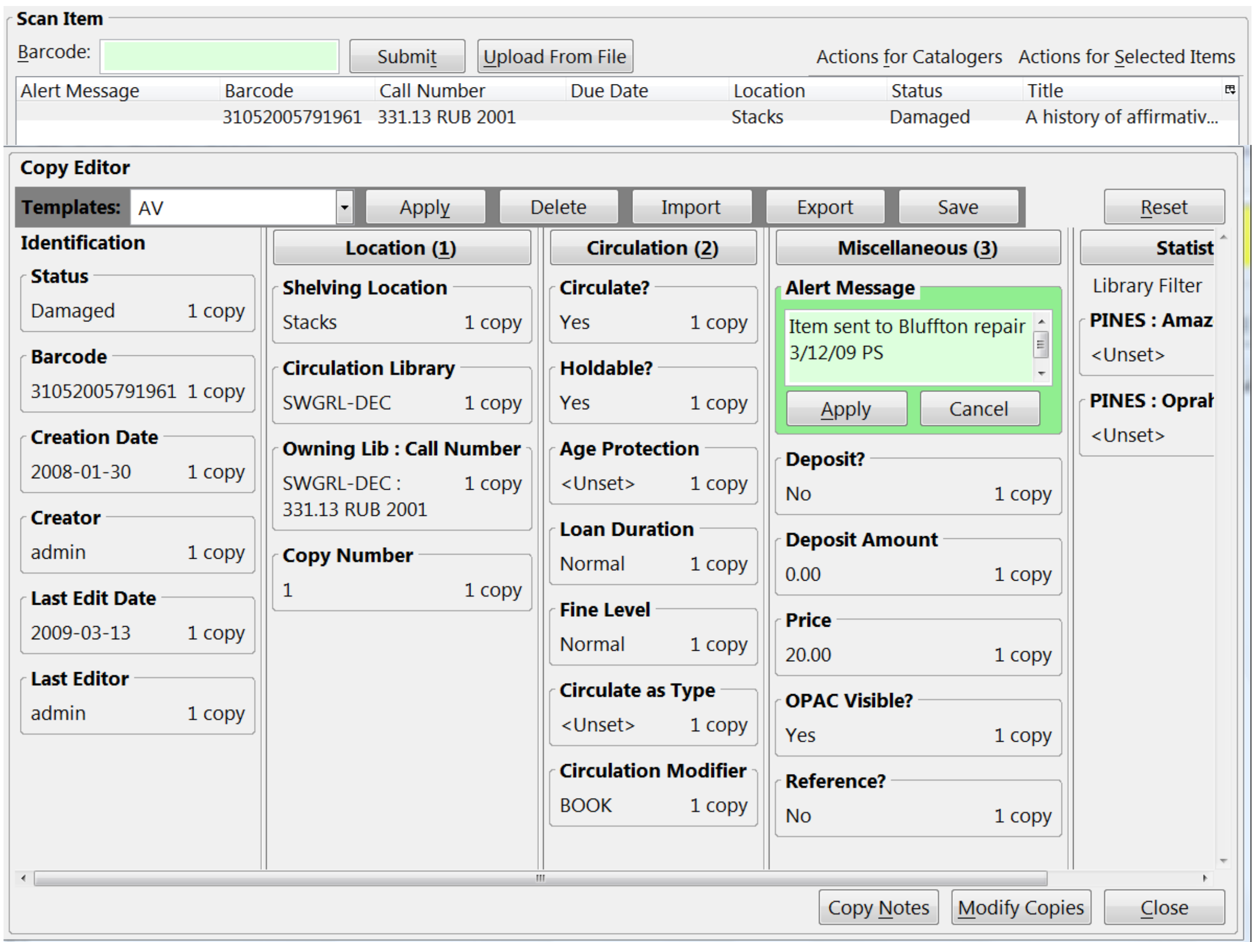
Damaged Returns from the Book Drop

If after examining the item, as part of the normal discharge procedures, you find that it has major damage e.g., water damage, chewed, written in, badly torn or missing pages then <u>do not discharge the item</u>.
Check to see if the damage was noted under the material's barcode when the material was checked out.


Actions for Selected Items
Copy to Clipboard
Add to Item Bucket
Show in Catalog
Show Item Details
Show Last Few Circulations
Edit Item Attributes
Mark Item Damaged
Mark Item Missing
Abort Transits
Check In Items
Renew Items
Print Spine Label
Replace Barcode
Save Columns


Mark Damaged
Mark Damaged
Change the status for these items to Damaged? You will have to manually retrieve the last circulation if you need to bill a patron. Barcodes: 31052005791961
Options
OK
Cancel





If it was, then a Problem Tag should be created for this item noting the damage, your initials, and date the slip. Next, proceed to discharge the item, check this item out to Repair (page 68), and forward it to the branch repair shelf, or to the owning branch (for items belonging to another library). *Or* if it cannot be repaired, then proceed to discard the item (see page 68).

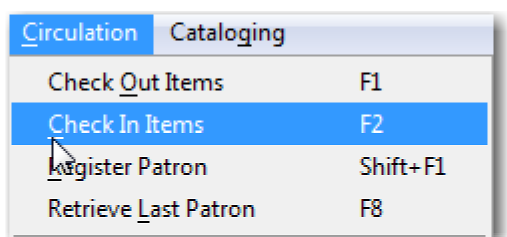
1. If it appears to be new (undocumented) damage perform a check status (page 72) to determine the customer's name and ID – Enter this into the library Problem Tag along with the description of the damage. The customer is called and a note is entered into their record identifying the title, description of the damage, staff initials and date. The item remains checked out to the customer until they clear up the problem with the owning branch. Forward it to the branch Problem shelf, *or* to the owning branch (for items belonging to another library).

2. If it appears to be unrepairable damage caused by the customer then the item will need to be discarded (see page 69 Checking out to Discard). A customer who damages an item beyond any further use is expected to pay the replacement price (page 86) based on the type of item, the reprocessing fee, and if the damaged item has an overdue fine, the fine is also charged. Once the damaged fees have been paid, select Damage as the reason for the customer charge, a receipt will be given to the customer, the item will be withdrawn (check out to Discard) from the Evergreen, and the item will be given to the customer.
   Note: Replacement items generally will not be accepted in lieu of payment for damaged material. If the item is an exact duplicate with the same ISBN, is brand new, is in original packaging and is in condition for Library use, a Branch or Department Manager may decide to accept it in lieu of a damaged item on a case-by-case basis.
3. If it appears to be an old item, start by looking at its circulation record to see if the damage may be due to use. In the following example, looking at the *Control Tab*, the item was cataloged 11/8/2004 and, referring to the Call Number/Item tab, you can see that this book circulated 18 times.

Therefore if the general condition agrees with the item record it might be that the item should be Discarded and not considered excess abuse by the last customer.
If after examining the item, you find that it has minor damage that can be repaired, e.g., spine labels, pocket replacement, DVD/CD cleaning, re-gluing, then the item should be discharged, a note attached to the item detailing the repair needed, date and apply staff initials. The item is then forwarded to the branch Repair shelf (after it is checked out to Repair – page 68) *or* to the owning branch (for items belonging to another library).
Note: Books with loose pages or broken spines *should not be circulated* until they are repaired.

Check in (F2)

To check an item in, select ***Circulation > Check In Items,*** or press **F2**.



The *Check In* screen appears along with a Check In toolbar at the bottom of the window (Figure 82. From this window, items can be checked in and/or have certain processes performed against them. The default is to check in items with the current date.

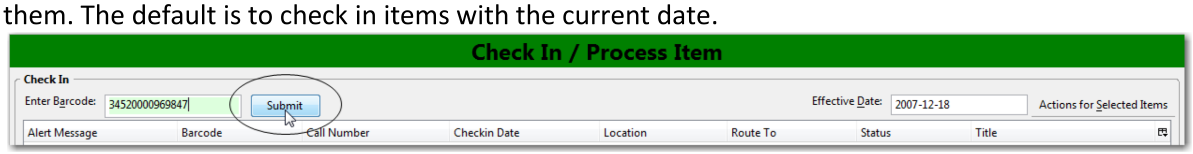


Figure 81 Check In process

To begin the check in, scan or type the barcode of the item into the box at the top left of the screen and click on the *Submit* button: or by press the *Enter* key.
The screen refreshes to show that the item has been checked in and the status is changed to *reshelving*, etc.

A list of items being checked in builds as additional items are scanned. You can print the list of checked in items using the *Print List* command button on the Check In toolbar.

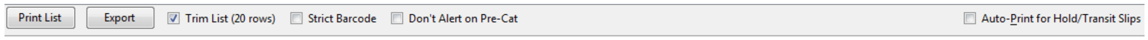


Figure 82 Check in toolbar

- The list includes status information for items and routing locations, for example: reshelving, on hold shelf, in transit, etc.
- An overdue item will display the fine in red.
- *Auto-Print for Hold/Transit Slips* automatically prints hold and transit slips at check in.
- *Print List* prints the entire list whenever you request it.
- *Strict Barcode* insists all barcodes entered conform to our standard 13 digit barcode.

    - To reprint the last hold or transit slip, click ***Circulation >Re-Print Last***.

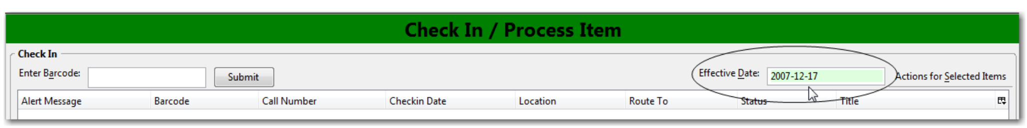
NOTE: Be diligent at checking the screen after each scan because if a message appears and another item is scanned on top of the displayed message the message will disappear, but the item scanned will **not** have been checked in.

Frequent messages are going to appear on the screen as material is discharged. You will see messages to verify the contents of the package (e.g., number of CDs in and audio package), late charges for overdue items, route to hold, or transit messages for material checked-in at a library other than the owning library, material lost for items that are long overdue (over 30 days), and items not in catalog (for material that is assumed lost and removed).

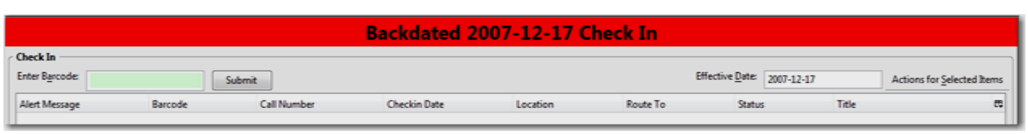
Bookdrop

To backdate items, enter the appropriate date into the ***Effective Date*** box. Dates must take the form of YYYY-MM-DD. Adjusting the effective date is required for clearing a bookdrop of a prior day's items.

To change effective date, select ***Circulation >Check In Items***, or press **F2**, and enter backdated date in *Effective Date* field.



The new effective date is now displayed at top of window.

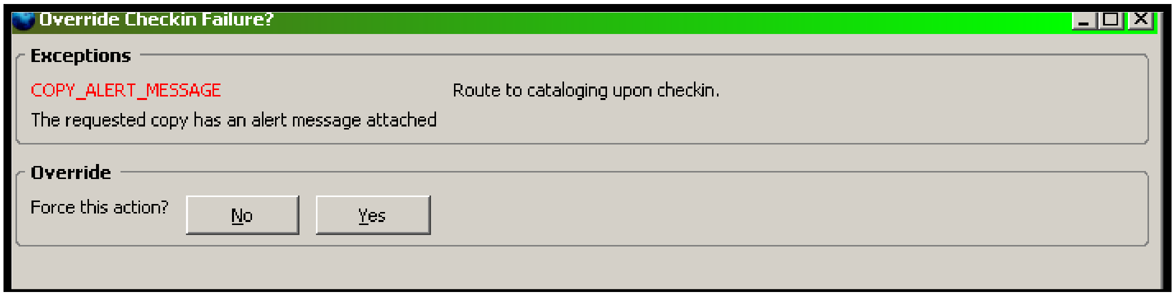


Check In Alert Messages

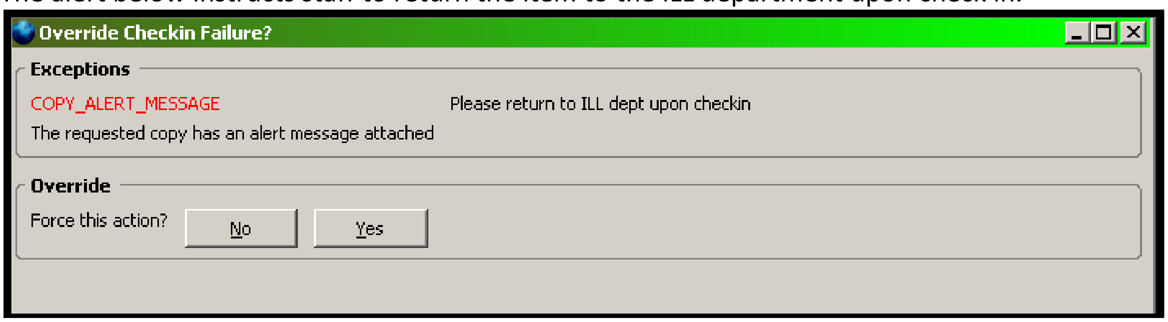
There are several alerts that can display upon Check In. These are generally alerts for which an action is needed. Following are several examples of Check In alerts.

If an item being checked in has been requested to be sent to cataloging, the following type of alert displays: *Route to cataloging upon check in*.

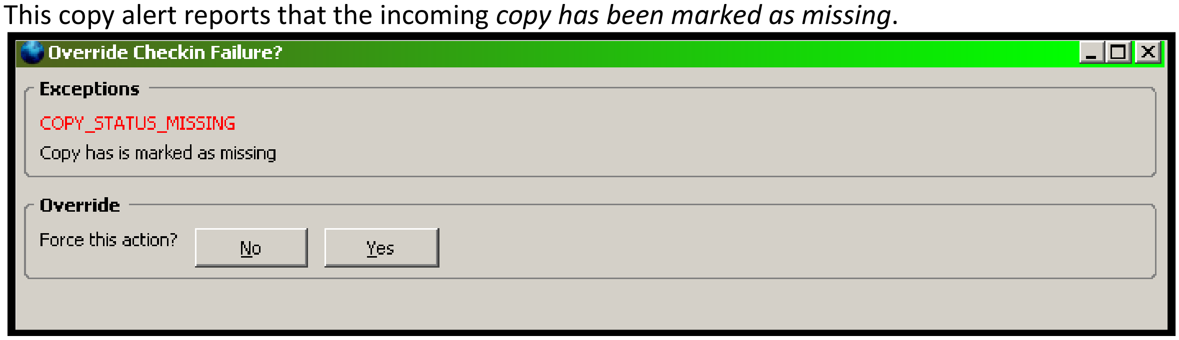
This is a copy alert message and it can be overridden if necessary.



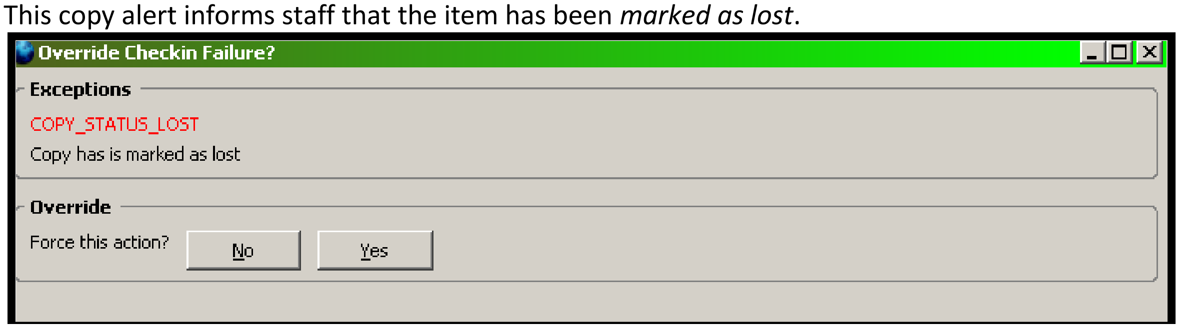
The alert below instructs staff to return the item to the ILL department upon check in.



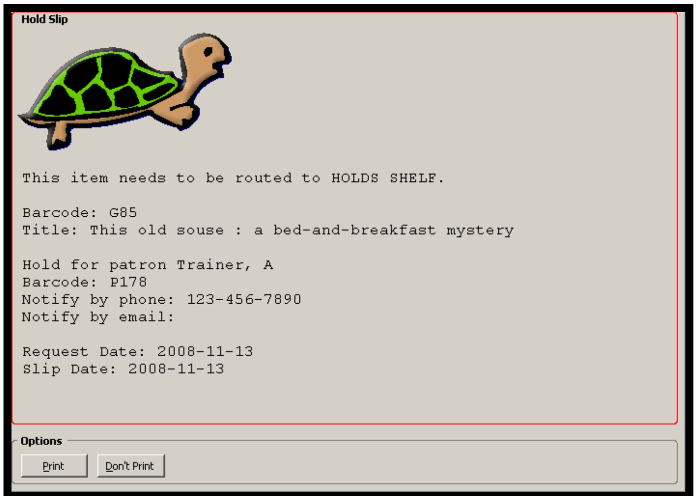
This copy alert reports that the incoming *copy has been marked as missing*.



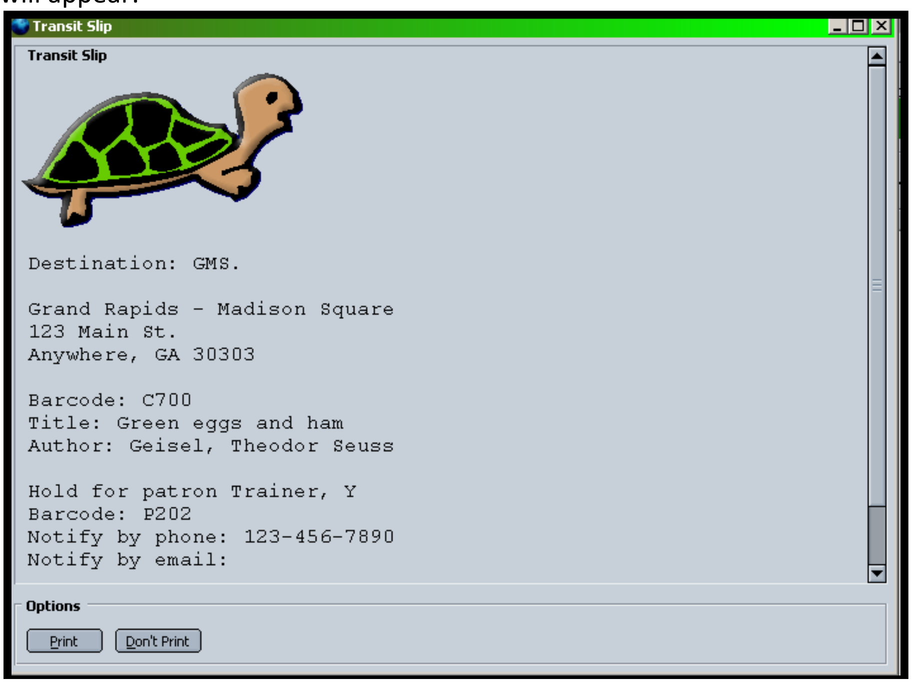
This copy alert informs staff that the item has been *marked as lost*.



There are also messages at check in that alert staff that the item is on hold. If an item being checked in is on hold for a customer at the local branch, the following message will appear.



If *Auto-Print for Hold/Transit Slips* is not turned on, you'll only see a pop-up message.
You have the choice to print the slip or not.
If an item being checked in is on hold for a customer at another branch, the following message will appear:



This is a Transit slip. Notice the two buttons at the lower left. Staff can choose to print the message for a transit slip to be inserted into/attached to the material or not by clicking on the appropriate button. The item is then sent to the other branch.

Chapter 4 Fines, Bills, and Payments

Overview

The Beaufort County Library charges users for services such as photocopying, visitor computer time, and visitor library privileges. The Library also charges for lost card replacement as well as overdue, damaged, and lost materials. A Bill record contains a fixed amount that the customer owes the library. It also contains the reason, associated title, date billed, item due date, and other pertinent information (Figure 83). There is also a transaction type and billing type field. Transaction type defines whether it was a system generated "circulation" type of bill or whether it's a "grocery" bill (those created by a staff person).
There are two ways Bills are created within a customer record:

1. Evergreen automatically creates bills.
    a. If a customer has an item checked out and that item becomes overdue, then the customer will be billed by the system for each day the item is overdue. You can click on **Full Details** on the Bill itself to see the individual charges and the note indicating **Overdue Fine**.
    There is a one day grace period where if the customer turns the item in one day late, the system will not charge for that day overdue. But if the customer returns it after that one day has passed, the system will charge them for that day. For example, if the customer returns the item one day late, no bill. If it is two days late, the system will bill for two days.
    b. If an item checked out to a customer as lost, Evergreen will bill (once the item is marked lost--page 133) the customer will be billed for the cost of the item along with any processing fee associated with the item, see.
2. Library staff may also add charges to a customer's account for damage etc.

Authorized library staff may, however, forgive fines in a customer's account. Use void if it's a staff mistake and the bill shouldn't have existed in the first place. You can void certain lines of billing, for example: overdue bills are generated day-by-day but you can go into the record to cancel a few days' worth of fines rather than having to void and rewrite the bill.
In some cases, you must also create bills manually using the *Bill a User* procedures. You can view bills from the user record, or if the bill is associated with a catalog item, by displaying that item's record. Items can be deleted from the catalog even if a charge for that item is still attached to the customer's record. If an item is deleted, the charge will remain on the customer's account.

Display a Customer Bill

The customer's bills can be displayed by retrieving the customer record and clicking on the *Bills* command button on the navigation toolbar.

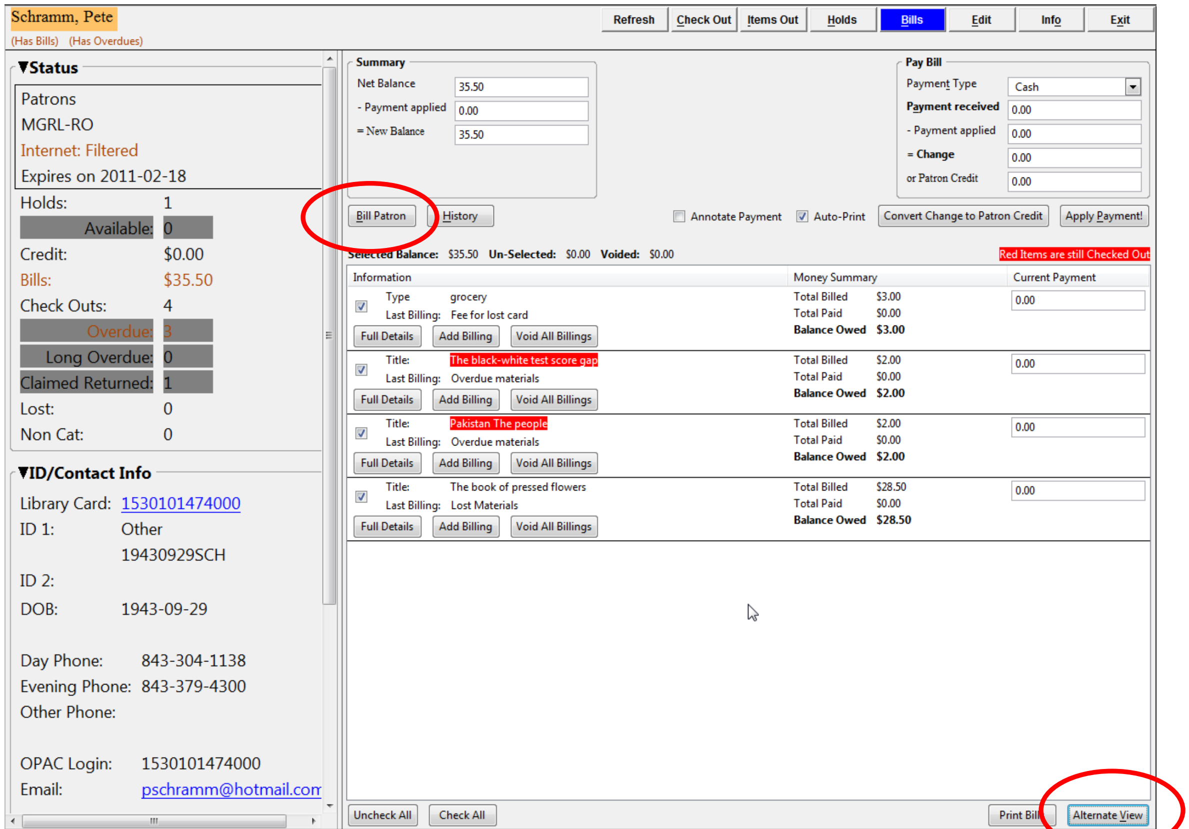


Figure 83 Display Customer Bill

Bill History

To view a customer's bill history click *History* (Figure 84). The bill history window includes current bills, bills which have been paid and bills which have been forgiven (Items forgiven will appear in the Payments pane showing a *Type* of Forgiven (Figure 101).
Currently you may not view any bills which have been voided, but this information is retained by Evergreen. It can be obtained by the system administrator, if necessary to resolve a dispute.

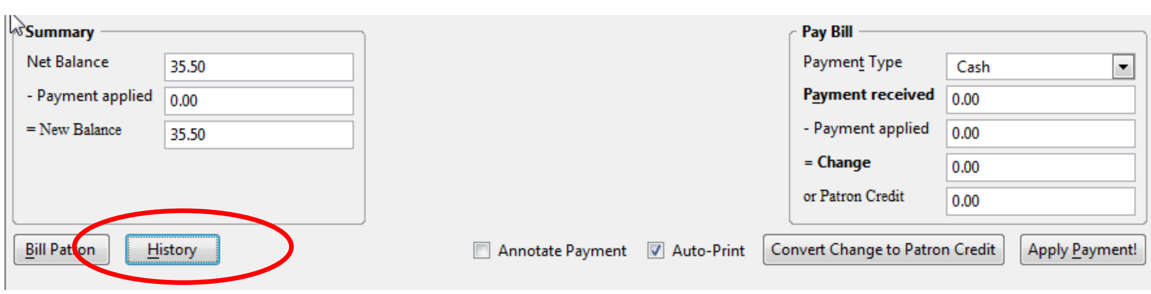


Figure 84 Bill History Command button

Once the *Bill History* window opens, the windows is split into two panes (Figure 85). The lower pane summarizes all bills while the upper pane displays an item summary for the item selected in the lower pane. You can click on any entry to display a *Summary* of that bill in the upper pane of the *Bill History* window. The upper pane also includes a toolbar for various functions including an *Alternate View* (provides more details then the Summary view), *Save Columns*, *Copy to Clipboard*, and *Print Export*.

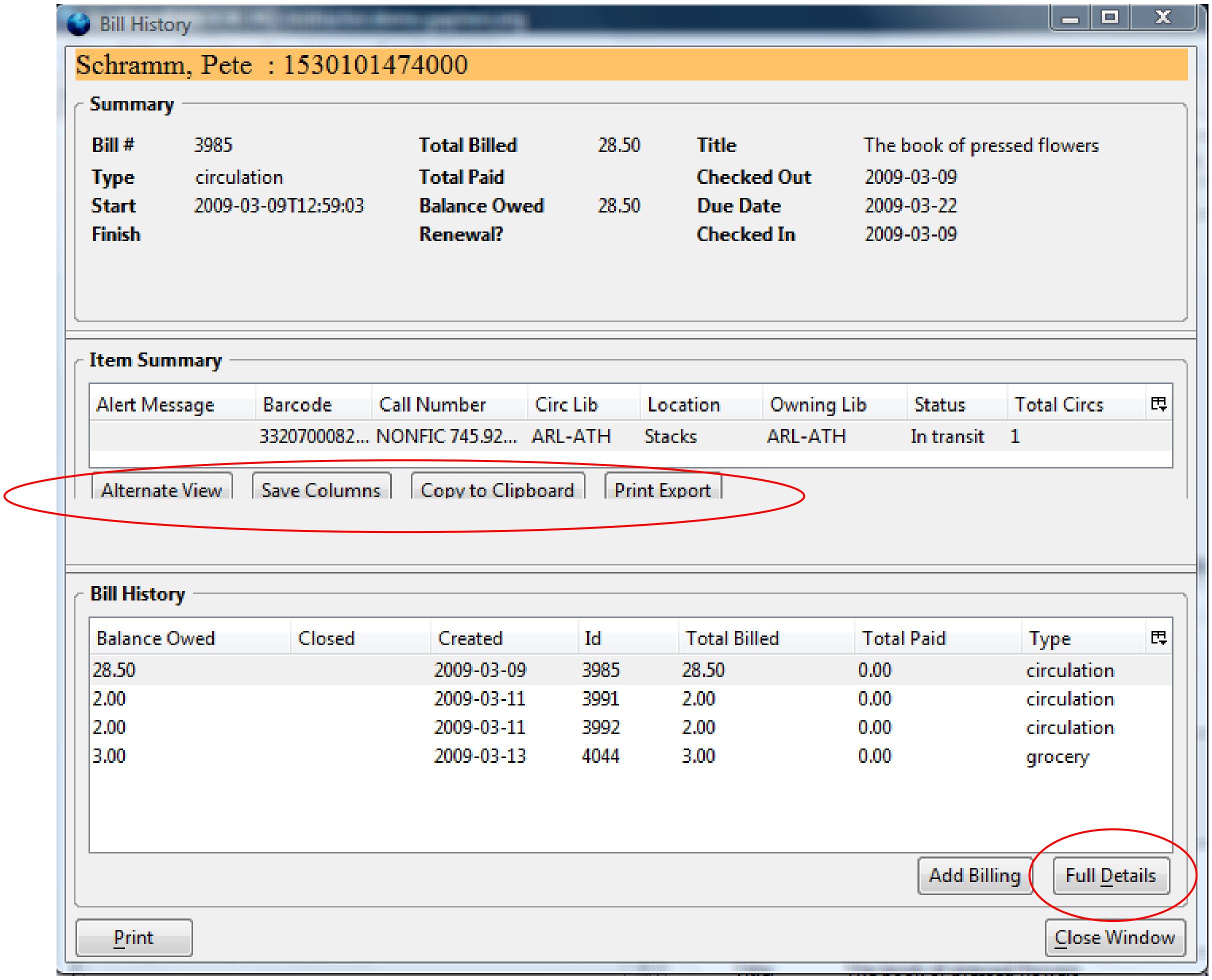


Figure 85 Bill History Window

Bill Details

For more information about a particular bill, you can select a bill from the list and click *Full Details* and the following window is displayed. In the example in Figure 85 and Figure 86 the bill ID #3985 appears with all details in the top pane of the Details window (Figure 86) This is where notes can be very helpful; however a note can only be added to a bill when the bill is first created. There is no mechanism for editing a bill.

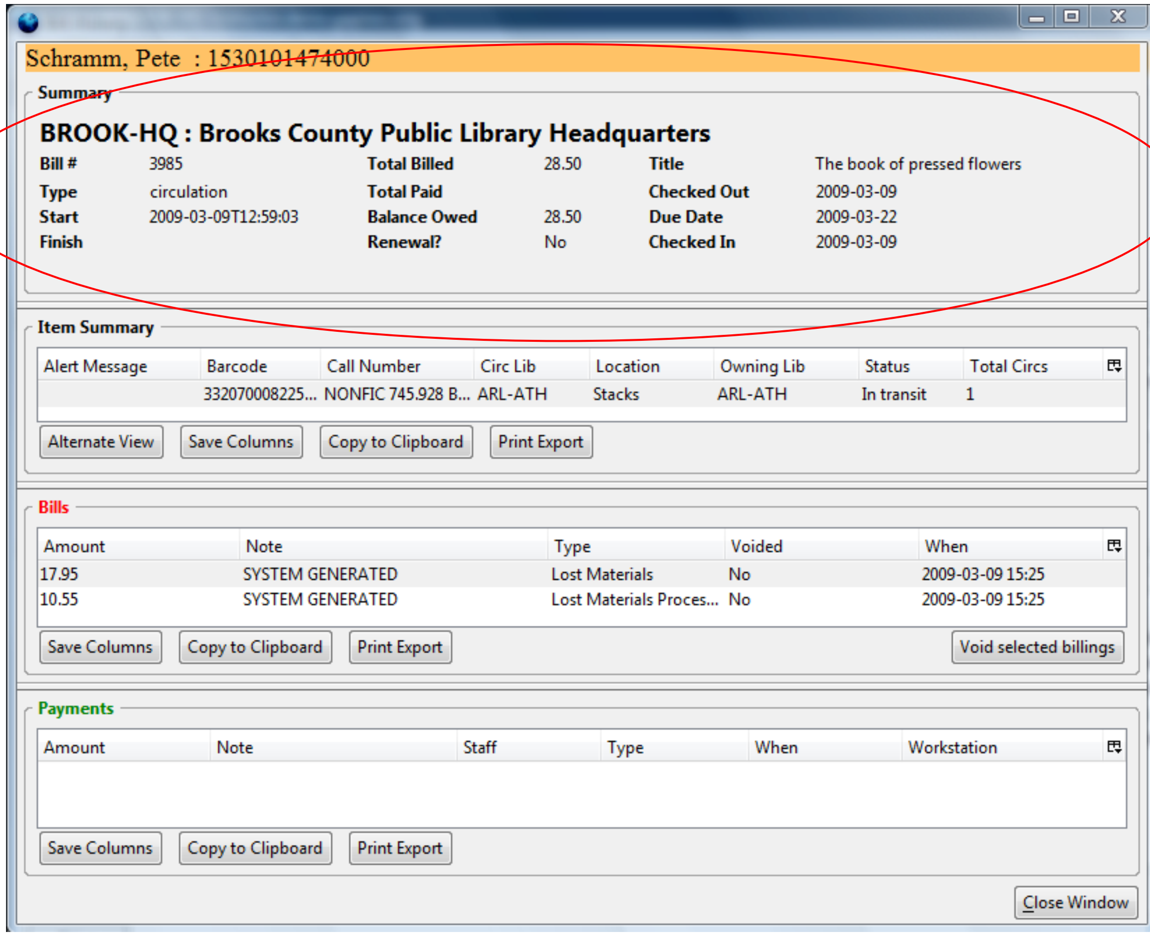
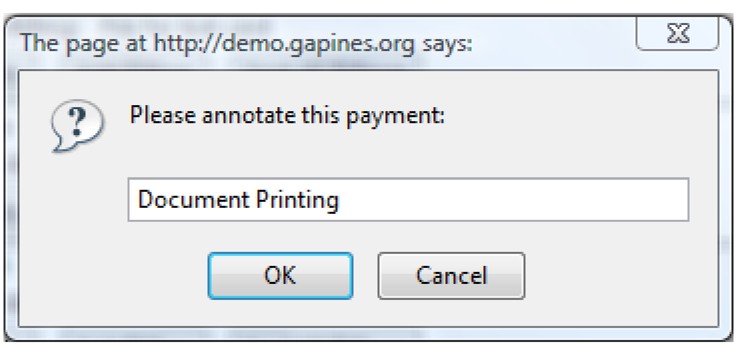


Figure 86 Full Details Window

Printouts:

To give the customer a printout of their fines, click *Alternate View* in the bottom right hand corner (Figure 83) and click the *Print* button on that page. The *History Summary* page also has a *Print* button.

Evergreen will let you print out an explanatory note on a customer's receipt. Under the pay bill box at the top right, check the *annotate payment* box. Type in the note you would like the customer to have on their receipt. Example: "This payment takes care of everything lost during July 2008." Or "Document Printing" as shown in figure.



You don't need notes to tell a customer what a bill was for, i.e. the title of a lost book; Evergreen does that.

Create a Bill

Creating a bill process begins by retrieving the customer record and clicking on the navigation toolbar *Bills* command button.
Clicking on the *Bill Patron* button (Figure 83) brings up the *Bill Patron Wizard* screen (Figure 87).

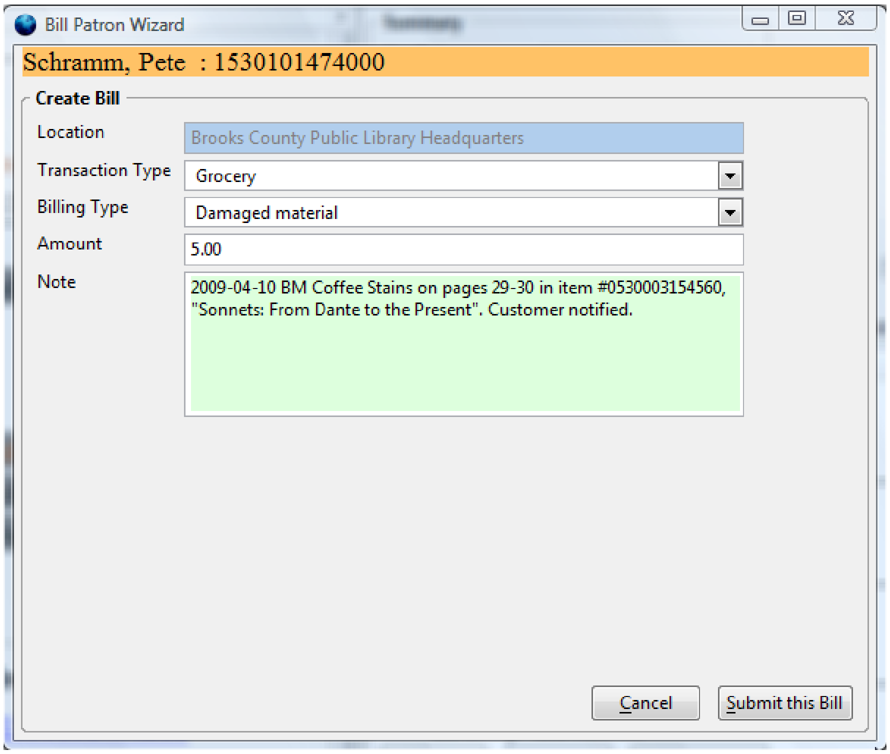
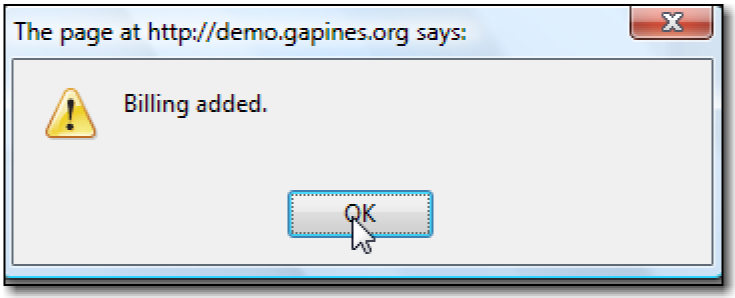


Figure 87 Create a Bill Wizard - example

Referring to Figure 87 Create a Bill Wizard - example:

> ***Transaction Type***--can be either Grocery or Circulation. System-generated bills e.g., over dues, lost items, etc. are labeled *Circulation* bills. *Grocery* bills are staff-generated and account for everything else. Choose the default *Grocery* value.
>
> ***Billing Type***--can be one of many. Bill reasons are defined at the Consortium level. Therefore make sure you select the Bill reason appropriate for your Library System (Figure 88).
>
> ***Amount***--Enter in the amount of the bill in the *Amount* field including $$.¢¢.
>
> ***Note***—Enter the reason for the bill in the *Note* field. When billing for a damaged item, always include item title and barcode number along with your initials date etc see example (Figure 87) in the *Notes* field. This is also the only opportunity you have to include an explanatory note for the bill being created. Follow the guidelines for identifying the author of the note—see page 23.

Then click on the *Submit this Bill* button and *OK*.



Damaged material
Donations-County
Fee for copies
Fee for interlibrary loan
Fee for Internet use
Fee for library card
Fee for lost card
Fee for placing a hold
Fee for processing lost library materials
Fee for sending patron bills to collection agency
Friends-Donations
Friends-NonTaxable
Friends-Taxable
Information Search fee
Internet Printing
Long overdue items
Lost materials
Lost/Replacement Cassette
Miscellaneous
NOT USED
Overdue Reserves charges
Recall overdue
Returned Check
Sale items

Figure 88 Billing Type List from the Dropdown

The bill appears at top of Information listing.

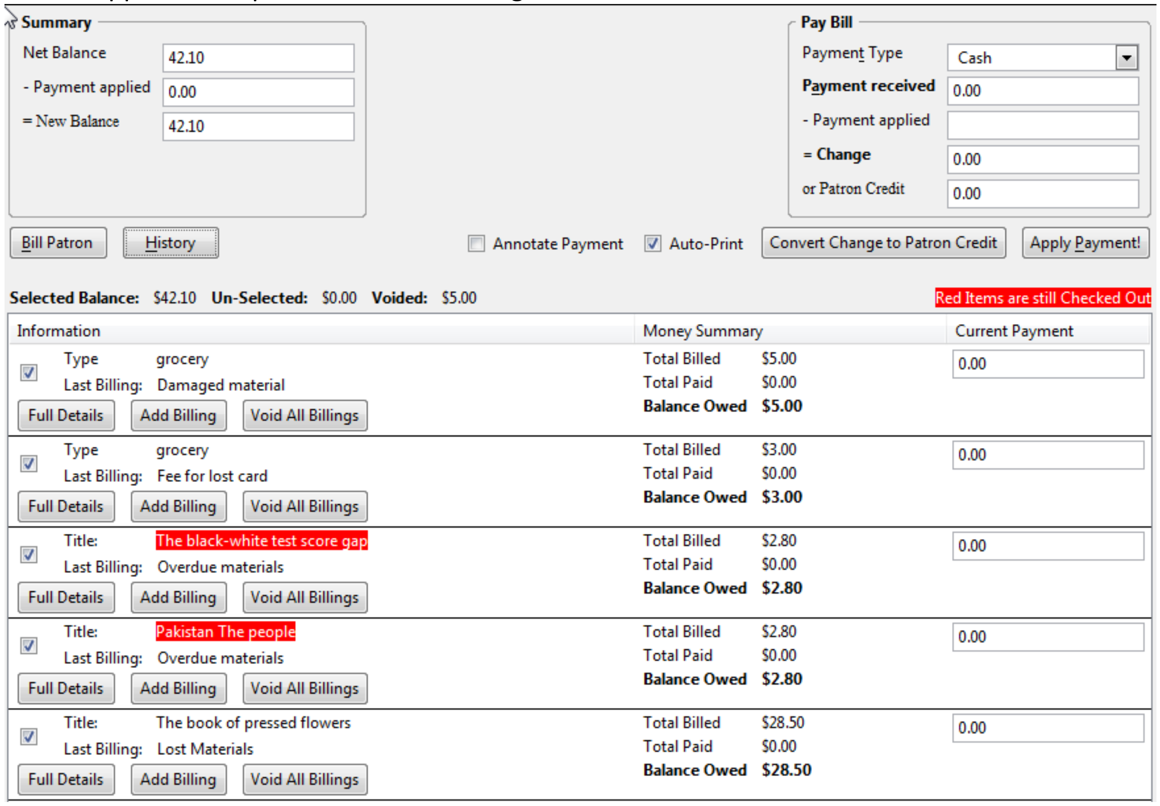
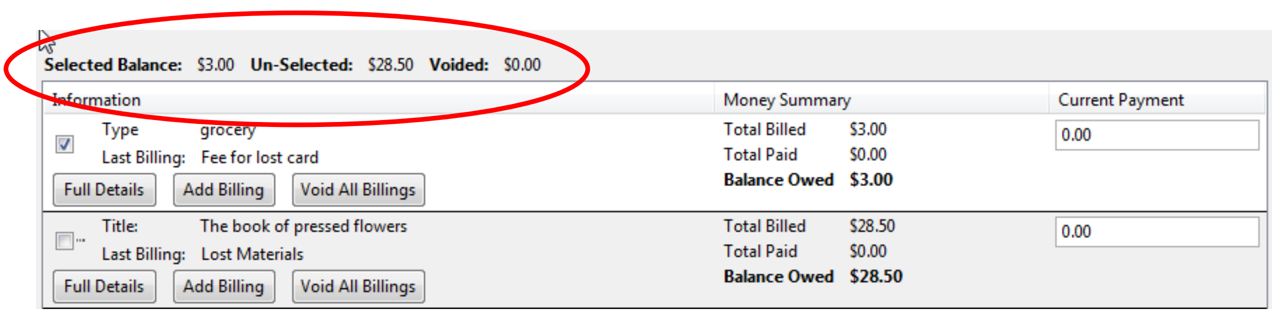


Figure 89 Revised Bill Summary

Un-checking one of the bills changes the Selected Balance. This is how the payment can be applied—either to all or just some of the bills. For instance the following example shows where the *Selected Balance* is $3.00 only part of the total of the two bills ($31.50). The second bill has been deselected by turning off its associated check box.



Adding to an Existing Bill

Referring to the above example (Figure 89) pressing *Add Billing* to the first item on the list allowed the addition of more charges to the item through the use of the *Bill Patron Wizard* (Figure 90).

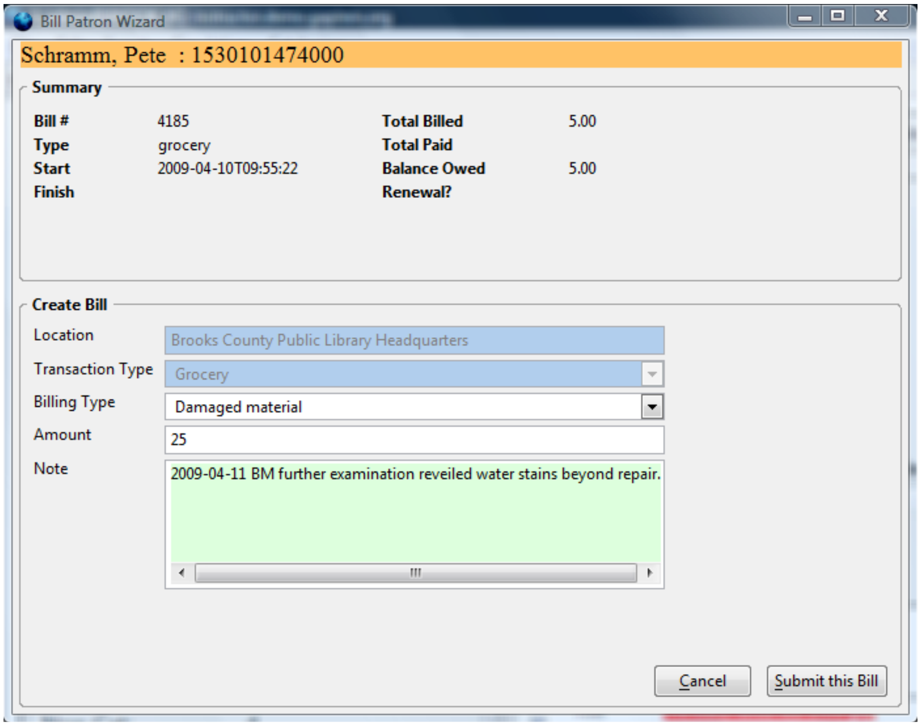
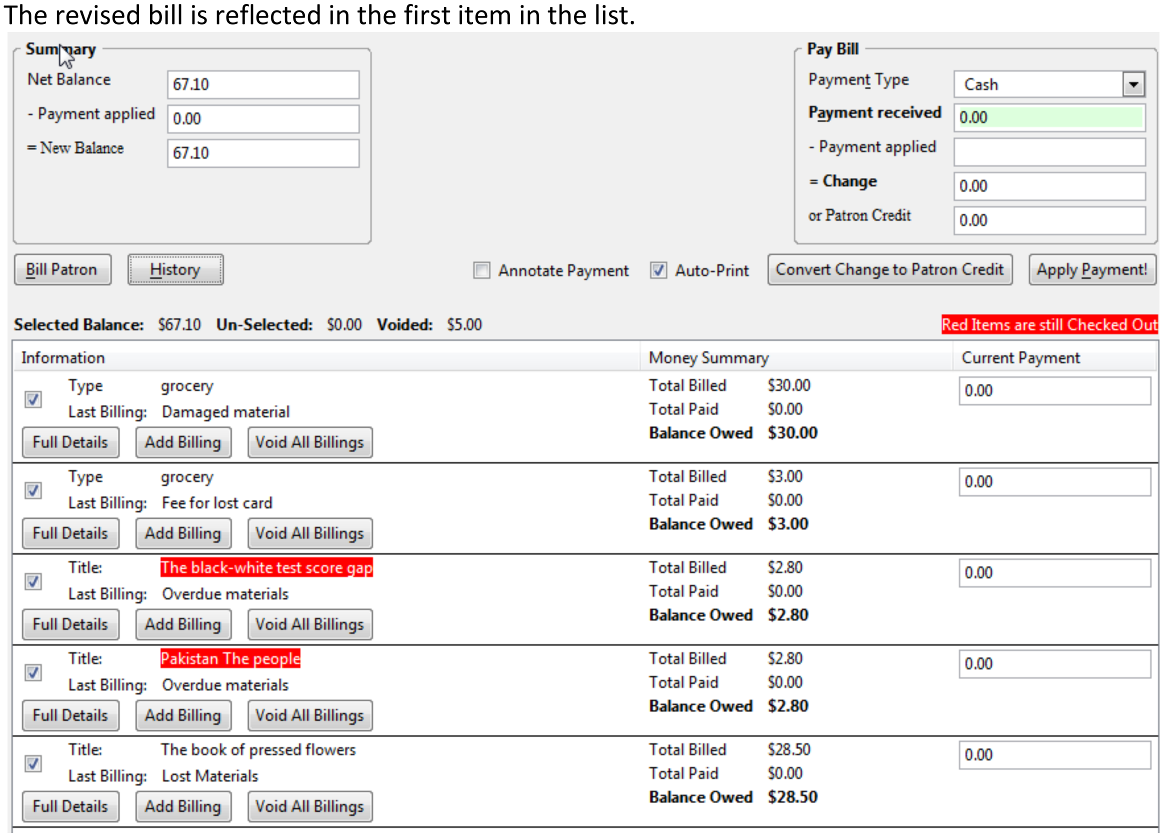
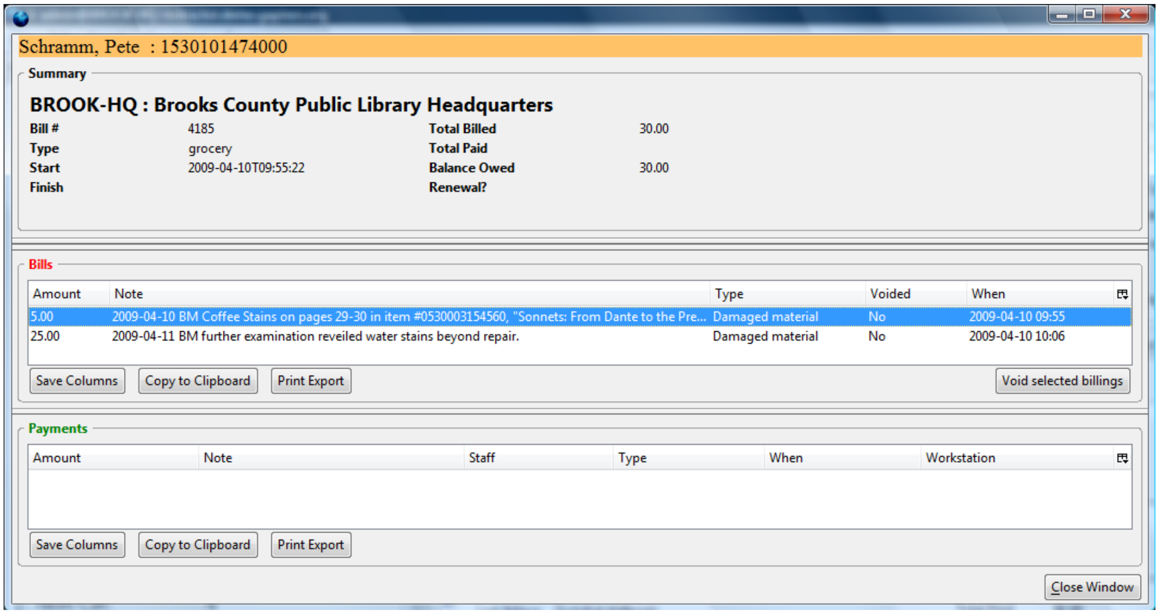


Figure 90 Add Billing to a prior bill

The revised bill is reflected in the first item in the list.



Clicking on *Full Details* for that item and Evergreen will show that it consists of two entries along with other details and their associated notes.



In another example of a multi-part bill Figure 91 shows the details of a System Generated bill. The *Full Details* button results in an additional dialog box being displayed with additional information regarding the bill.

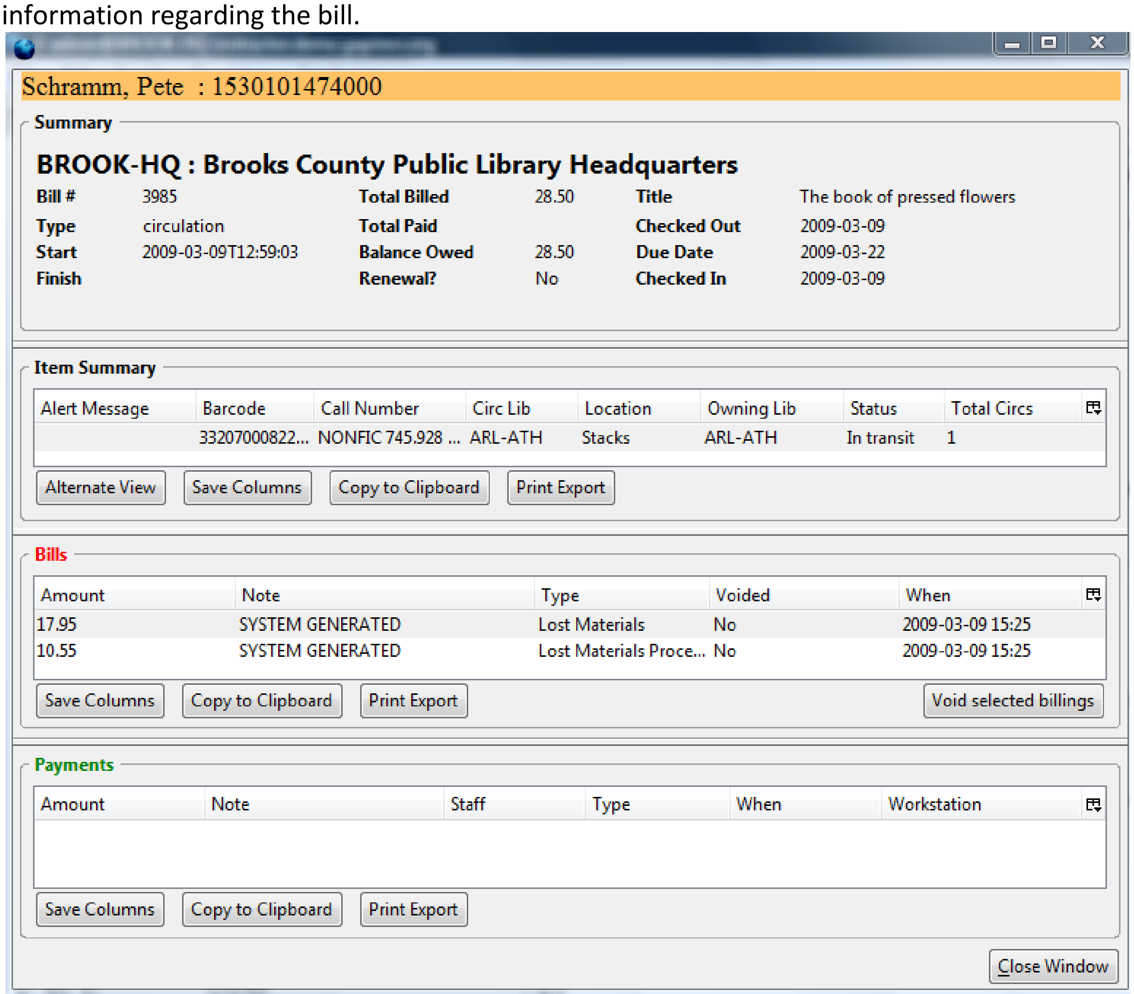


Figure 91Full Details of a System Generated multi-part bill

Edit a Bill

To edit an existing bill click on *Add Billing* (Figure 83) under the bill you want to edit.
The Add Billing interface is the same *Bill Patron Wizard* (Figure 92) with the exception of added *Summary* information regarding the bill's history. When you are finished making additions click on *Submit this Bill*. Note that editing a bill **Adds** to the entry—then to revise the total, you must void the line item you don't want from the *Full Details* window. The note created when you first create a bill is not available for editing.

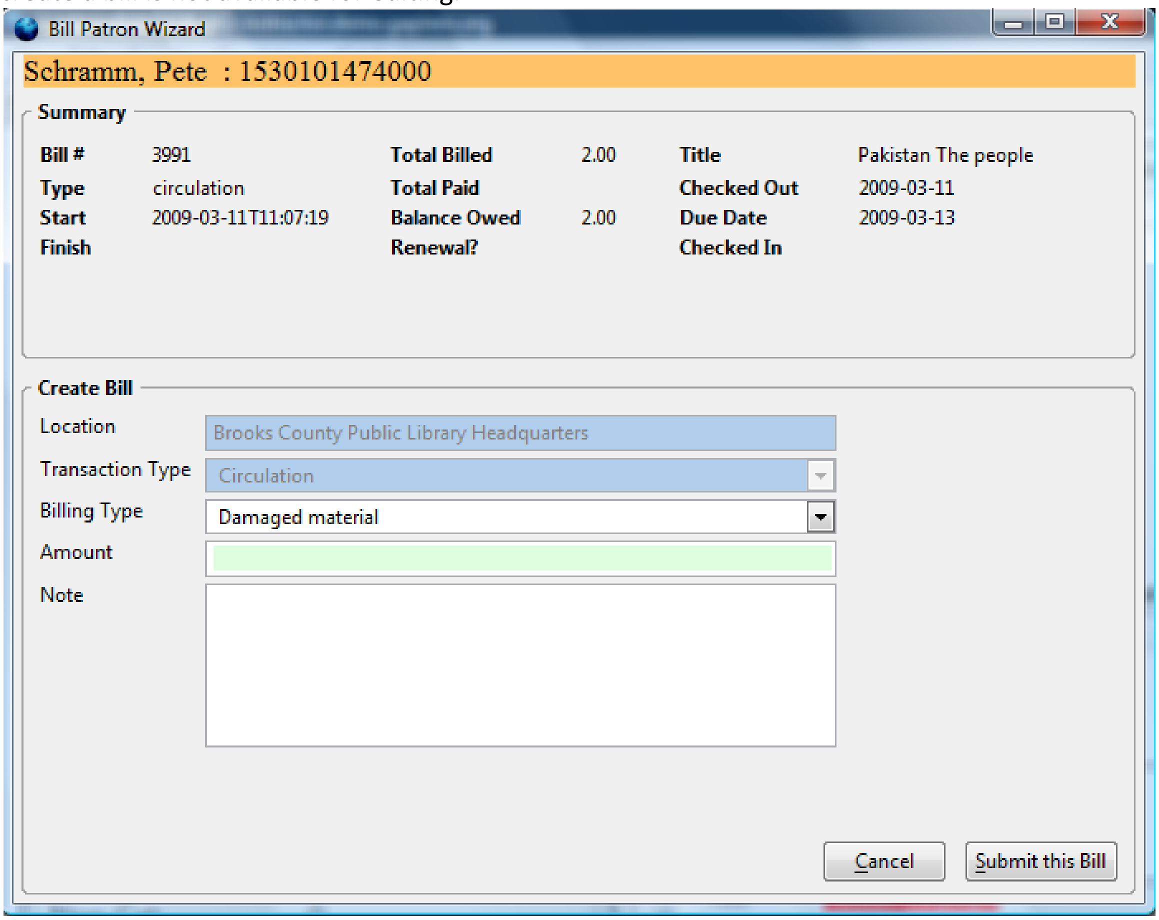


Figure 92 Edit a Bill

Bill at Check in

To add charges for damaged materials upon check in, simply click on the navigation toolbar *Items Out* button in the customer record, highlight the item to be billed, and click on *Add Billing* under the *Actions for Selected Items* menu (Figure 93).

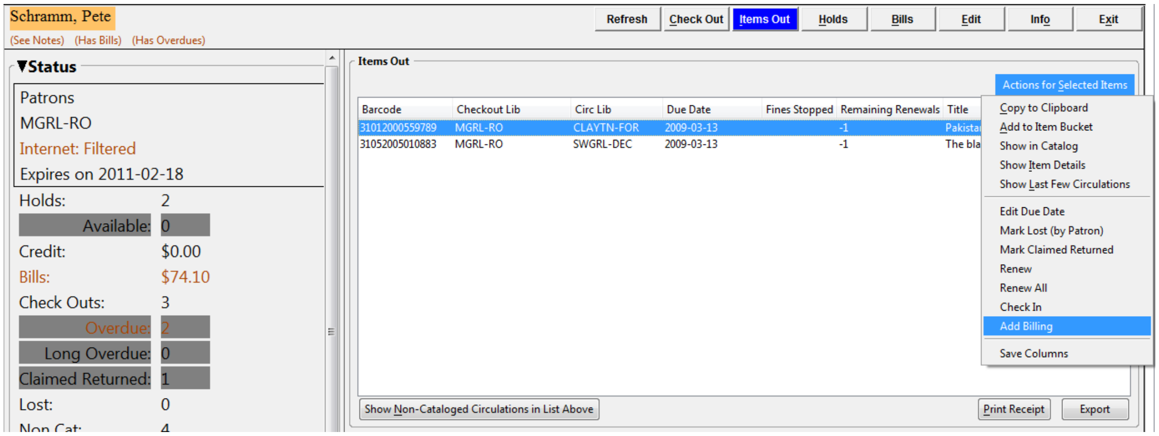
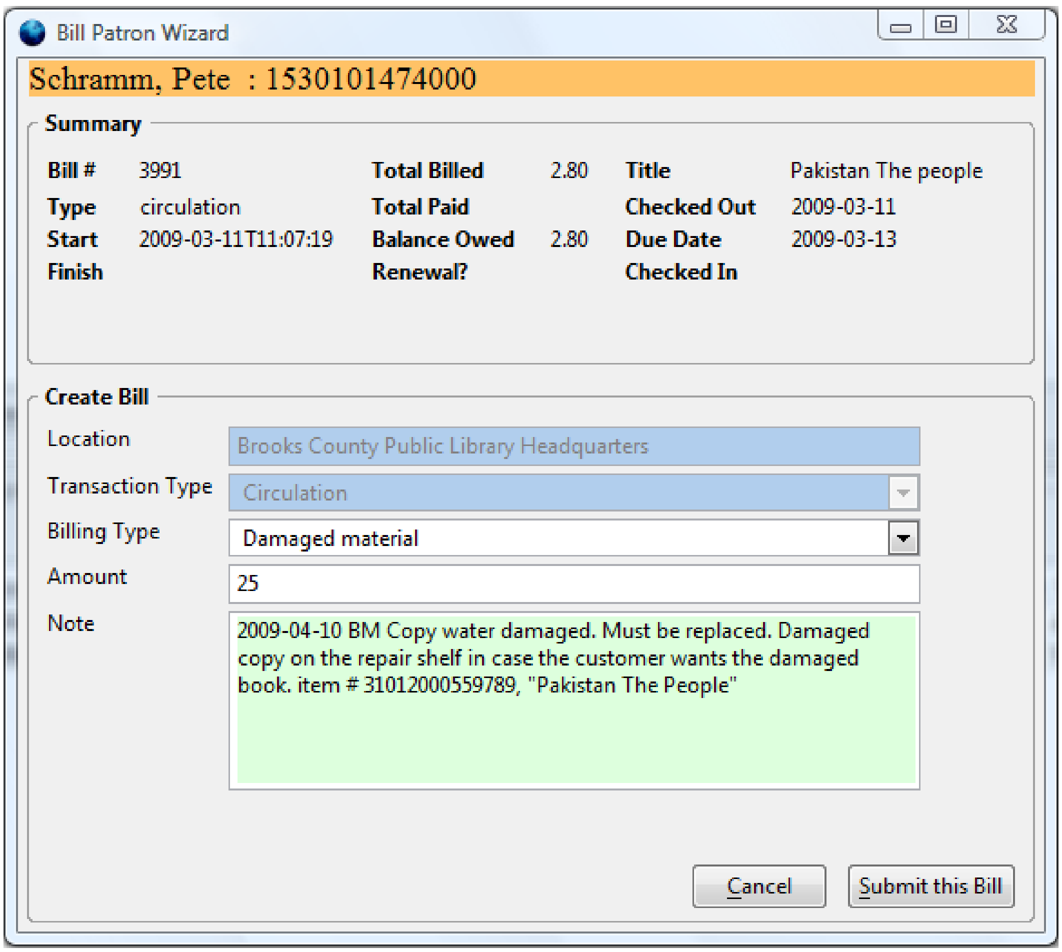
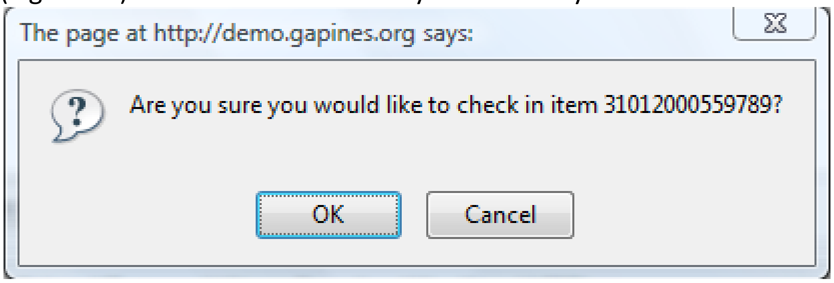


Figure 93 Bill damage to a returning item

The *Bill Patron Wizard* appears. Fill in the appropriate information and click on *Submit this Bill* and *OK.*



Now with the item still highlighted, click on *Check In* from the *Actions for Selected Items* menu (Figure 94). Click on *OK* when the system asks if you want to check the item in.



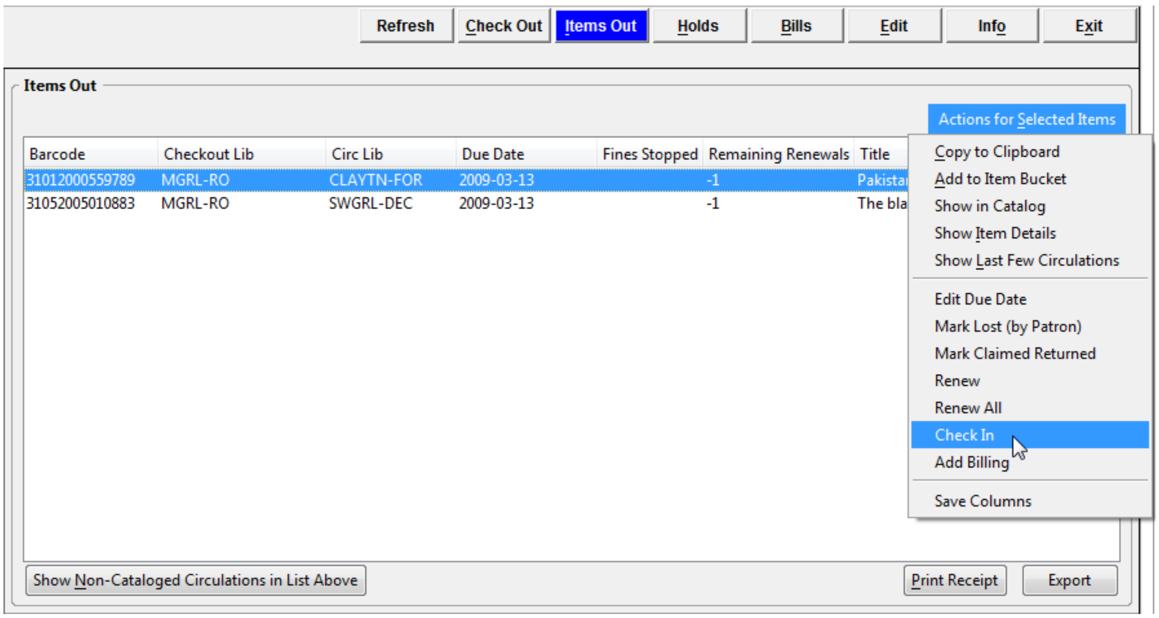


Figure 94 Check in Damaged item

Now click on the *Bills* command button in the customer record, and if there are no System bills on the item, new bill will be displayed at the top of the list. In the example this item was returned late so it had System bills and therefore remained in the order it had been in the Customer's Bills list Figure 95. Notice also that the bill is the sum of the damage and the System generated late fines. Click on *Full Details* to review the charges and possibly void the late fees (Figure 96).

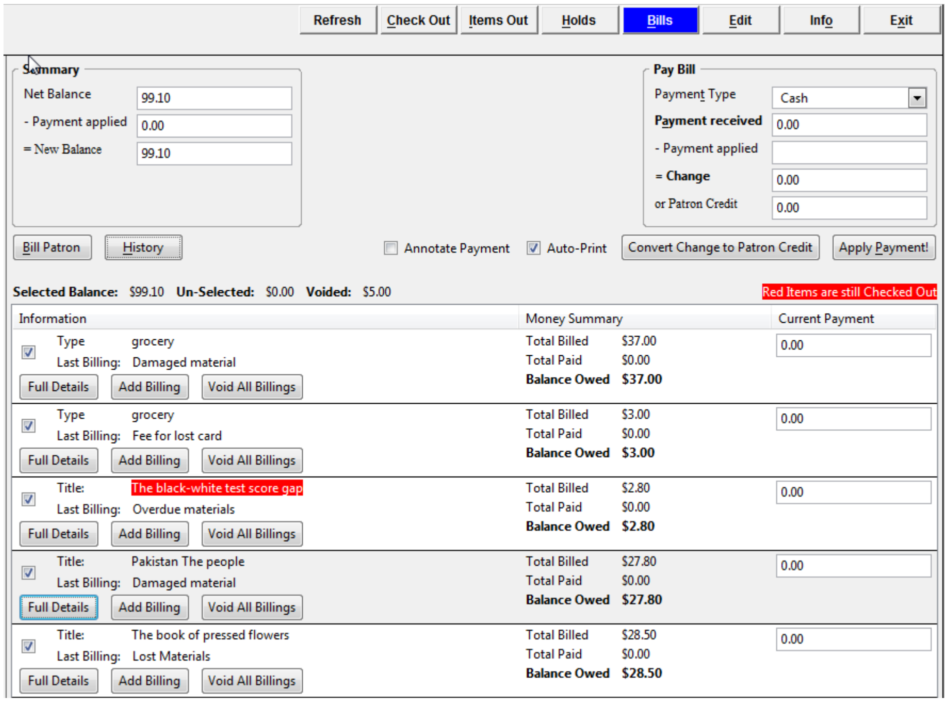


Figure 95 Revised Customer Bills List

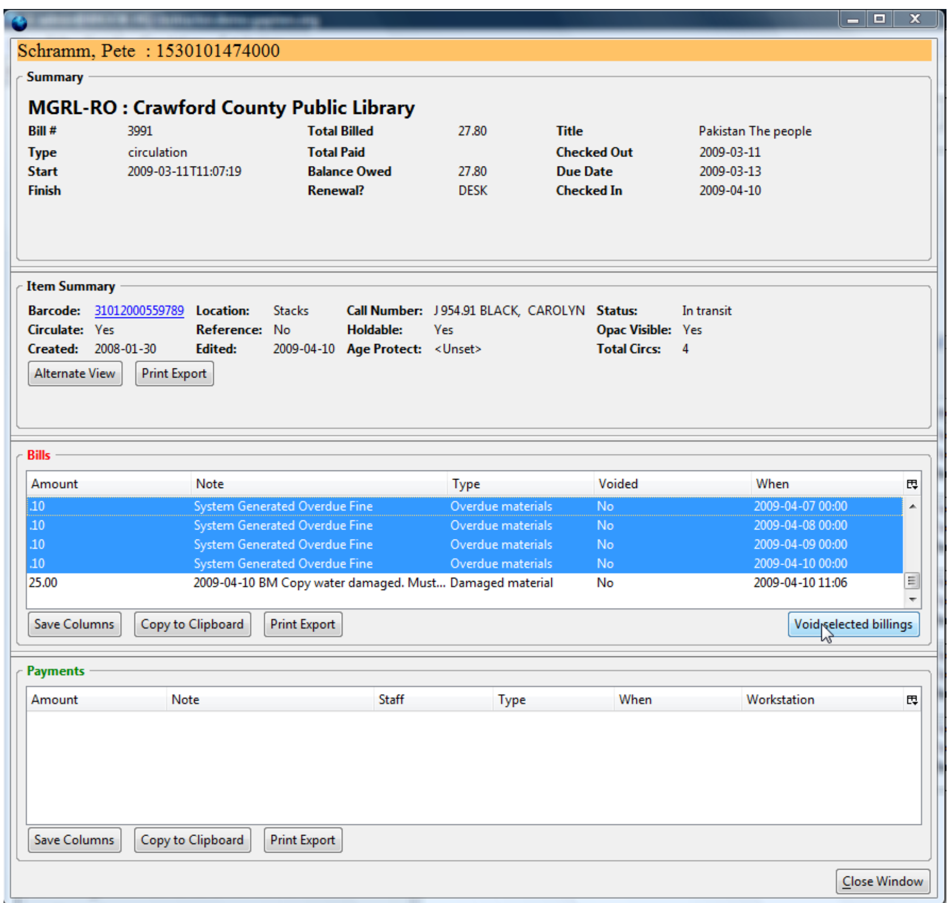


Figure 96 Voiding an Overdue Fine

Making Payments

Pay All

To begin paying bills start by clicking on the navigation toolbar *Bills* command button for the desired customer. In the light green *Payment Received* box enter the amount being paid (Figure 97). If all of the boxes are checked in the fine list, the payment will be applied to the top fine first.

There is a helpful line which summarizes how much is in the selected balance, how much is un-selected and how much has been voided. **Note make sure to unselect Red Items that are still checked out if those items are going to continue to accrue charges**.

Select the *Payment Type* (cash-default or check) from the drop down box.

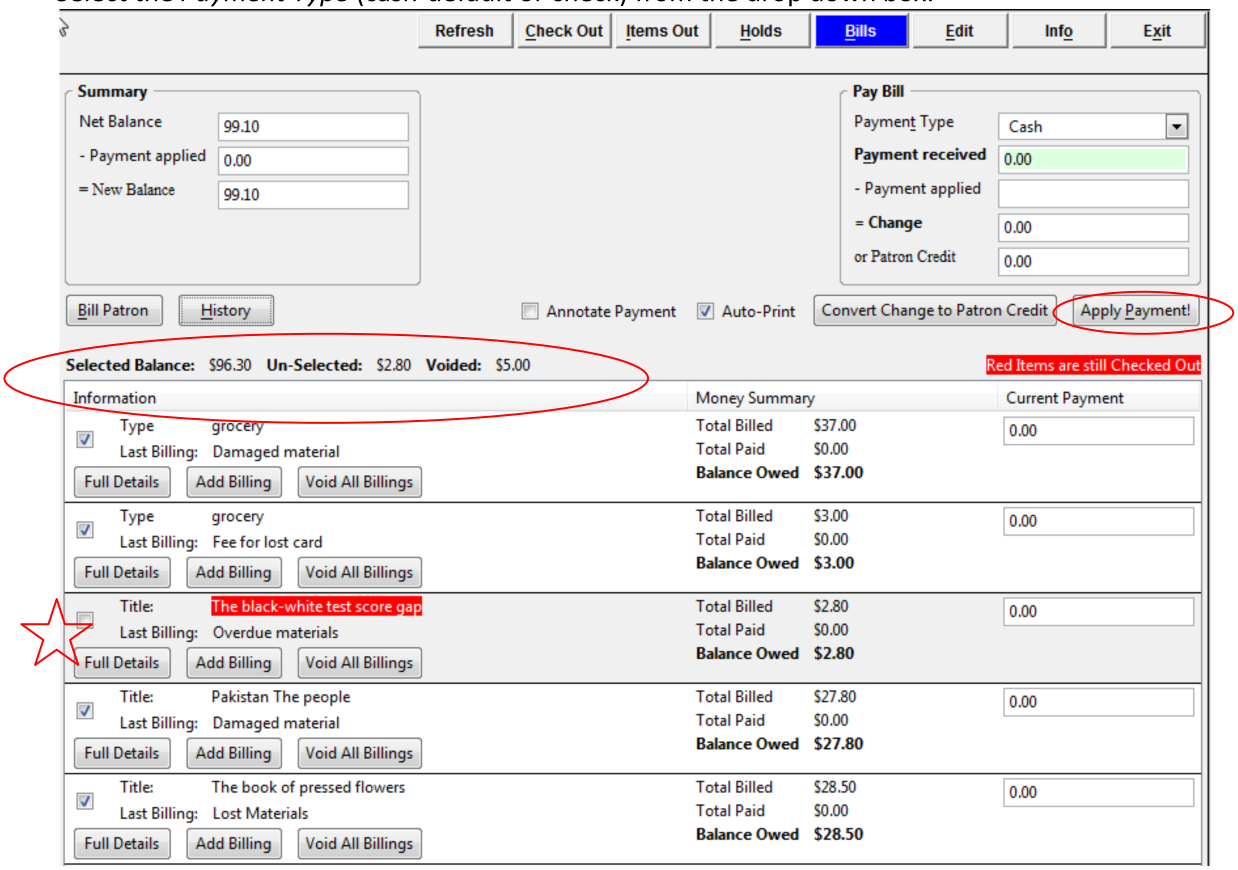


Figure 97 Pay Customer Bill

Apply the payment by clicking *Apply Payment.* A receipt will automatically be printed. Note Beaufort County Library does not support the feature *Convert Change to Patron Credit*. All change for a bill payment should be immediately returned to the customer.

Partial payment

If you need to apply the payment to a particular fine, leave that bill checked and any others unchecked. Type in the amount to be paid in the Pay Bill area as above and click on the *Apply Payment* command button. The payment is applied and a receipt is automatically printed out for the customer.

The new balance is displayed (Figure 99).

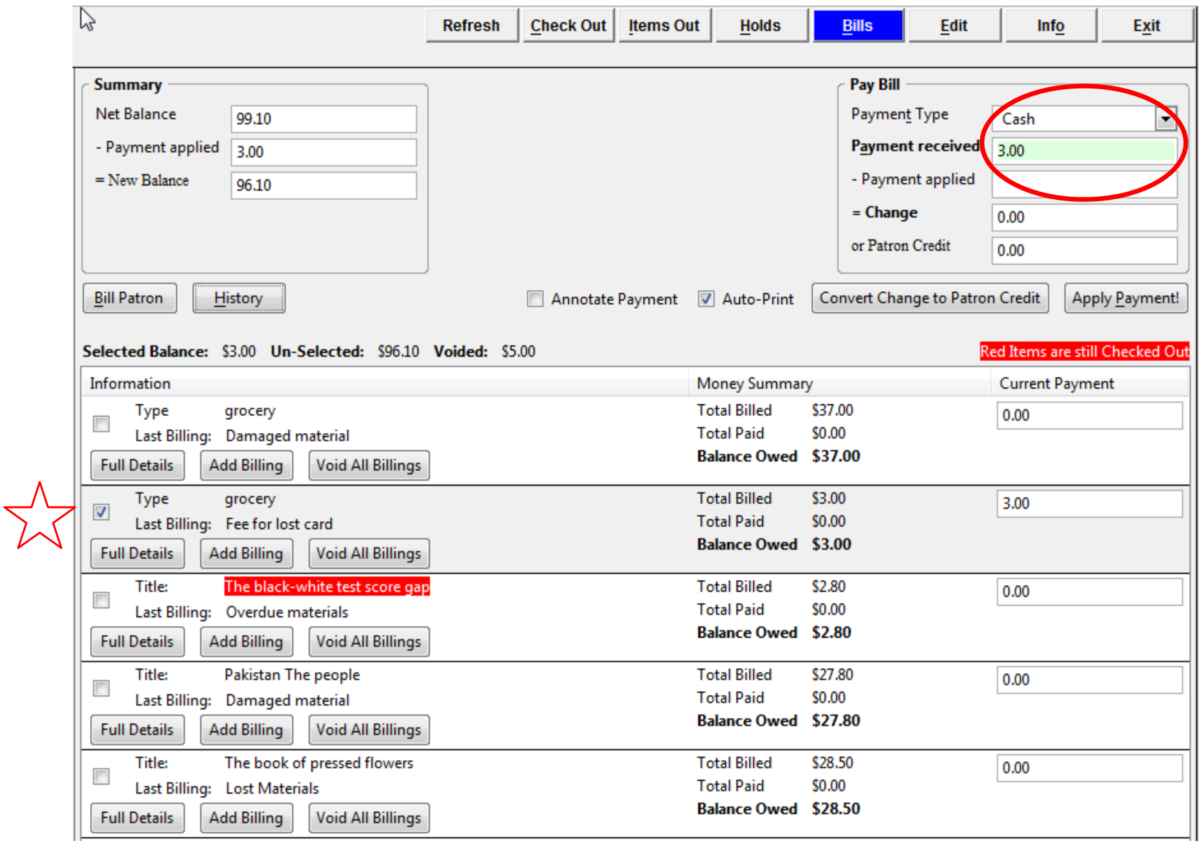


Figure 98 Payment on Selected Item

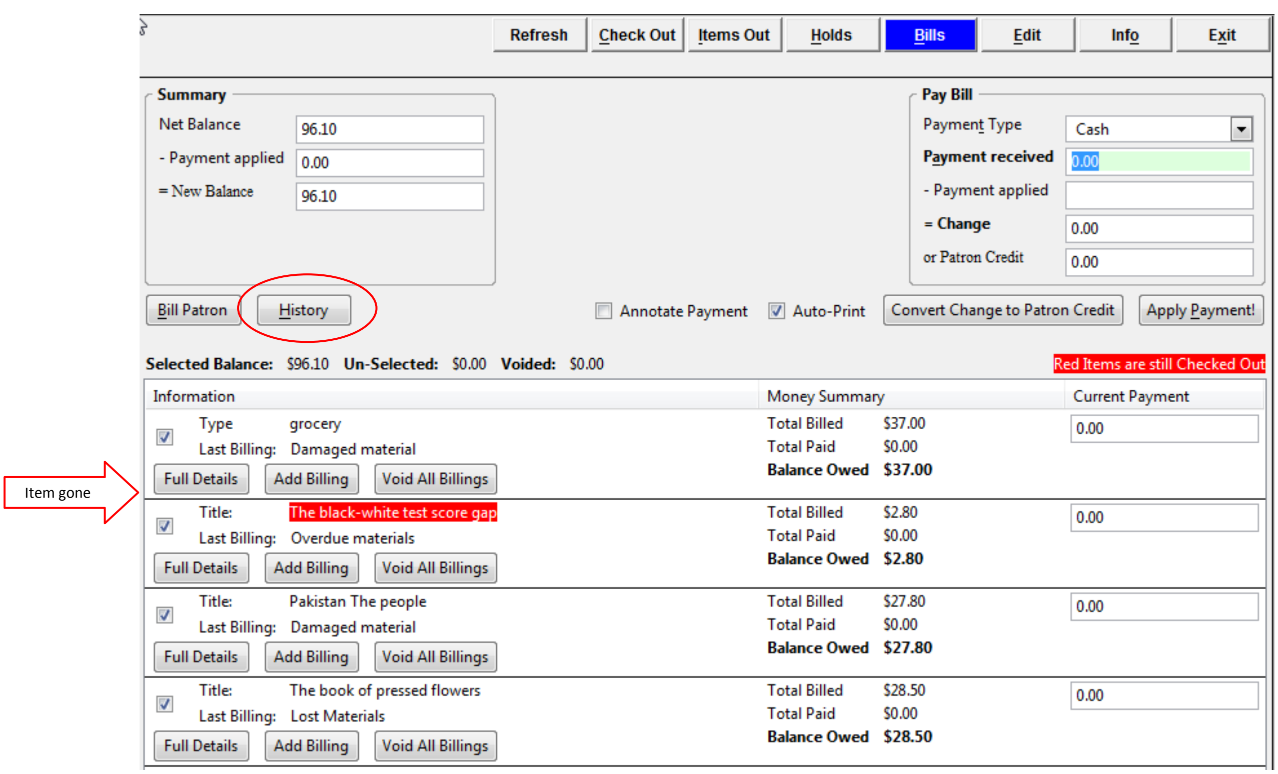


Figure 99 Remaining Balance after a partial payment

If you want to confirm you action click on *History* and you can check that the item was paid (Figure 100).

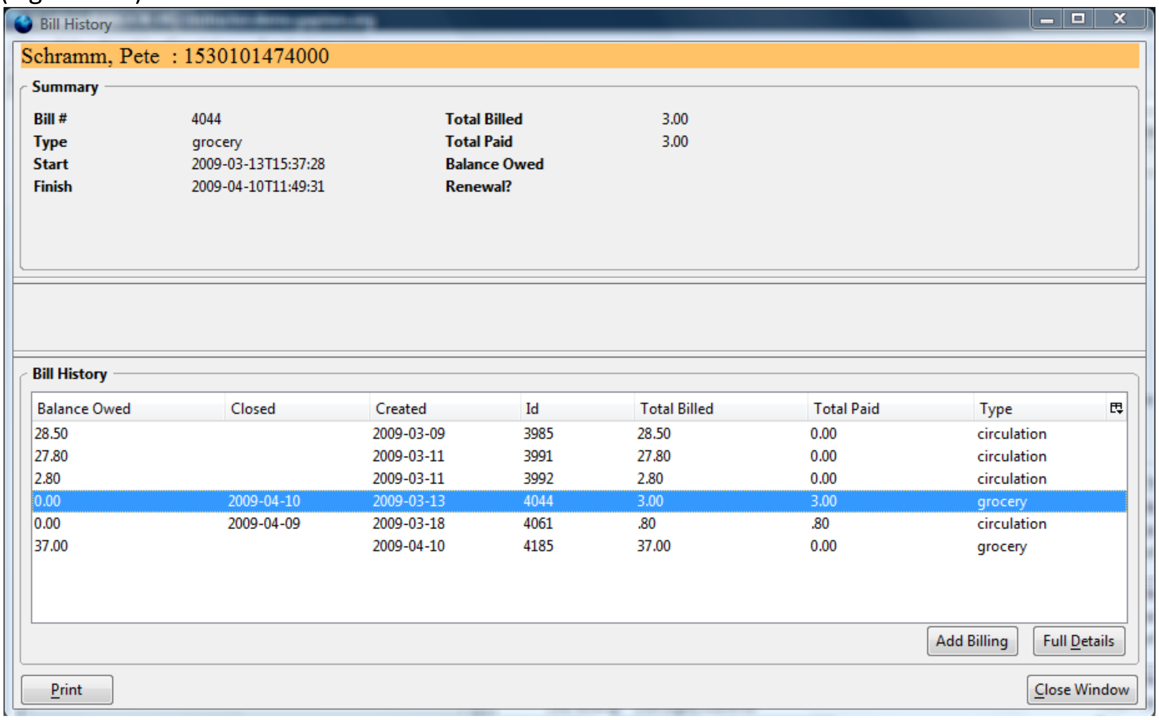


Figure 100 Reviewing a customer's payment history

The Difference between Forgive and Void

It is important to use the correct action when forgiving and voiding fines and bills. Problems can result from using void when forgive would be the correct action.

- Forgive is to be used when the original charge was valid, but for some reason, the library decides that the customer does not have to pay the fine (or a portion of the fine). For example, maybe the customer was hospitalized. Or the library has a special amnesty - or partial amnesty - day. In the case of Forgive, the amount that has been forgiven is recorded in the system, along with any other payments on the same charge.
- Voiding a bill is basically cancelling it. It wipes it out as though it never existed. The record does not show up in the customer history but may be retrieved by the System Administrator if needed.
  Void is to be used when the original charge should not have been charged. For example, the bill was entered do to a staff error, such as an overdue fine on an item that was not checked in properly, or bills for damage that was done by someone else. Or the system charges a person who shouldn't have been charged. This is when you want to wipe out the charge entirely and have no record of it in the system. If you "void" a fine, you do not put in any dollar amount because nothing is being credited (you are just wiping out the mistaken charge).

If necessary, individual lines may be voided by going to "Full Details" and voiding individual charges

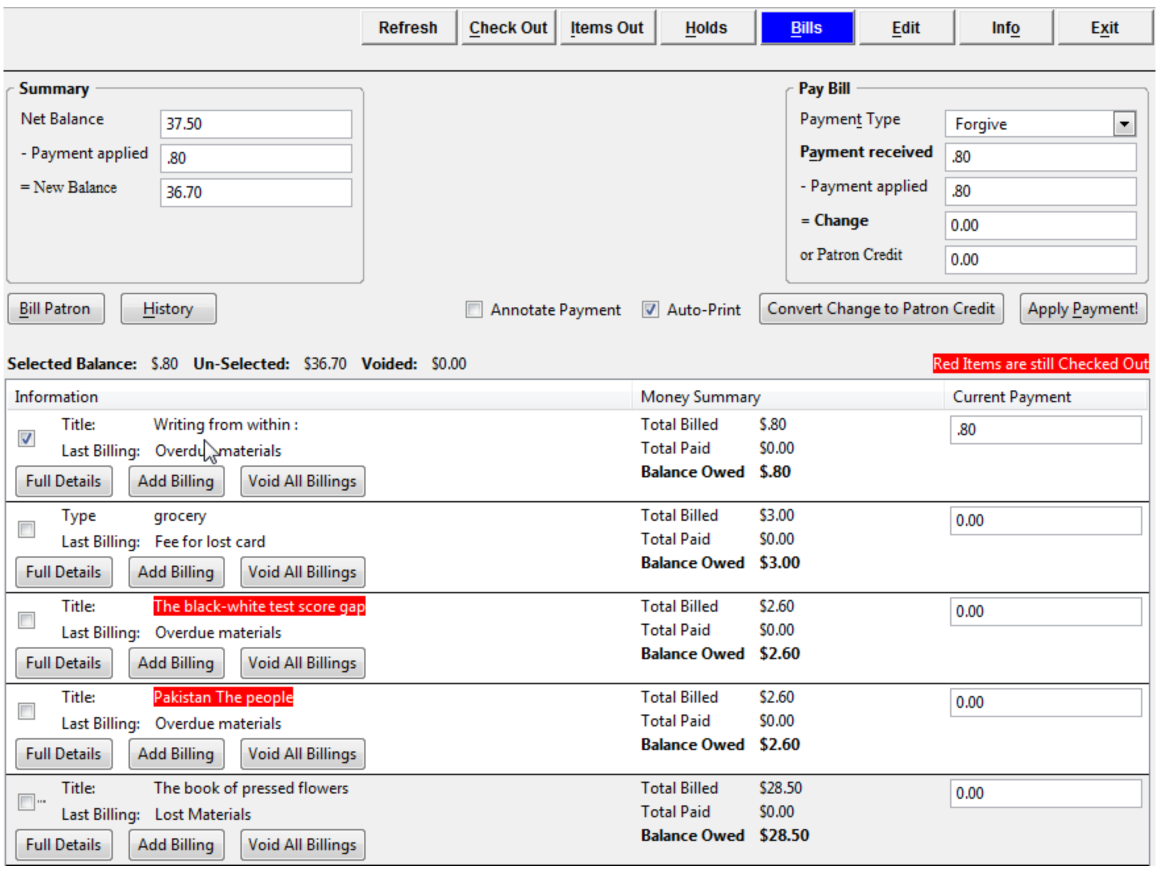
The basic rule of thumb is:

- Forgive - put in the dollar amount that you are forgiving.

- Void - do not put in any dollar amount - the "void" will wipe out the complete charge.

Forgive Example

To begin to forgive bills, start by clicking on the navigation toolbar *Bills* command button for the desired customer. In the *Payment Received* box enter the amount being forgiven and select *Forgive* from the *Payment Type* dropdown. **Make sure that you have deselected any individual bills not being forgiven**. Now click on *Apply Payment*.



Going to Full details or History you will be able to see that the bill was forgiven (Figure 101).

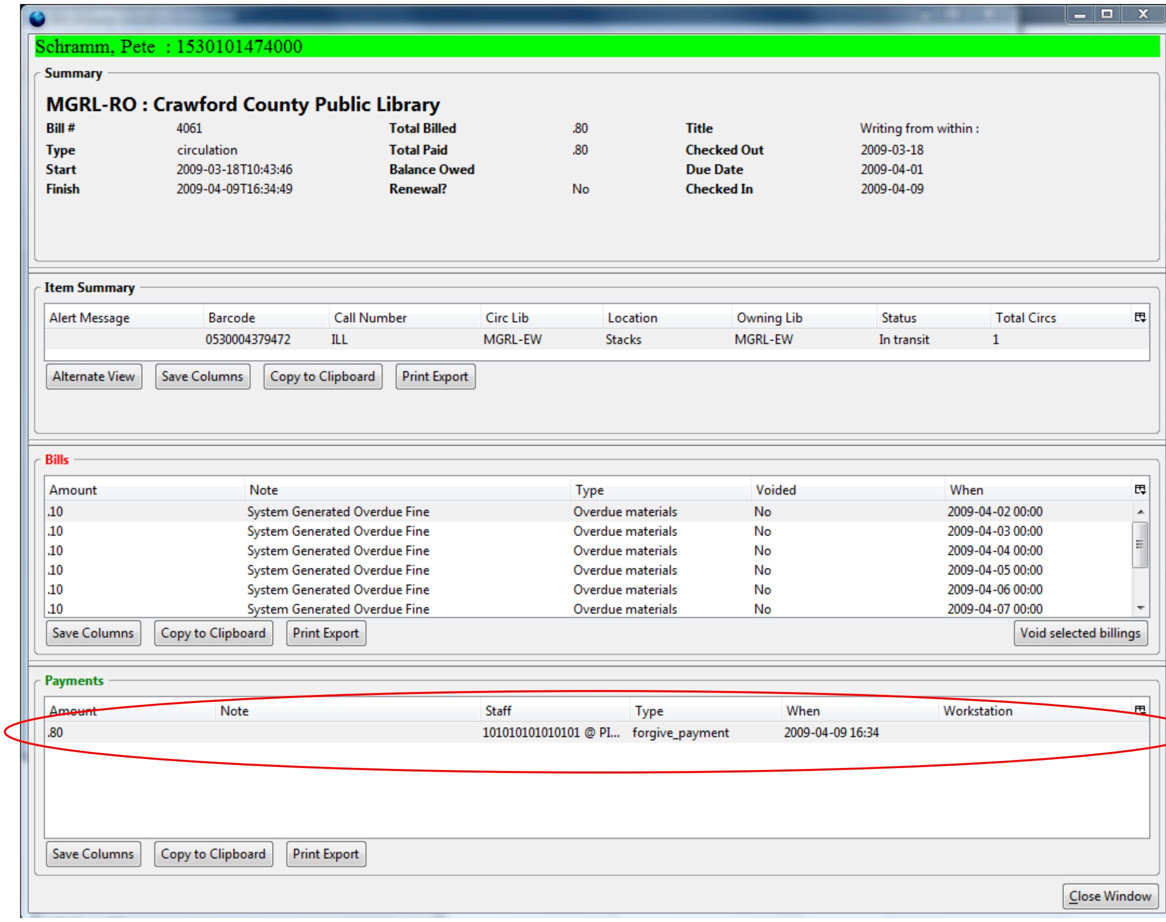
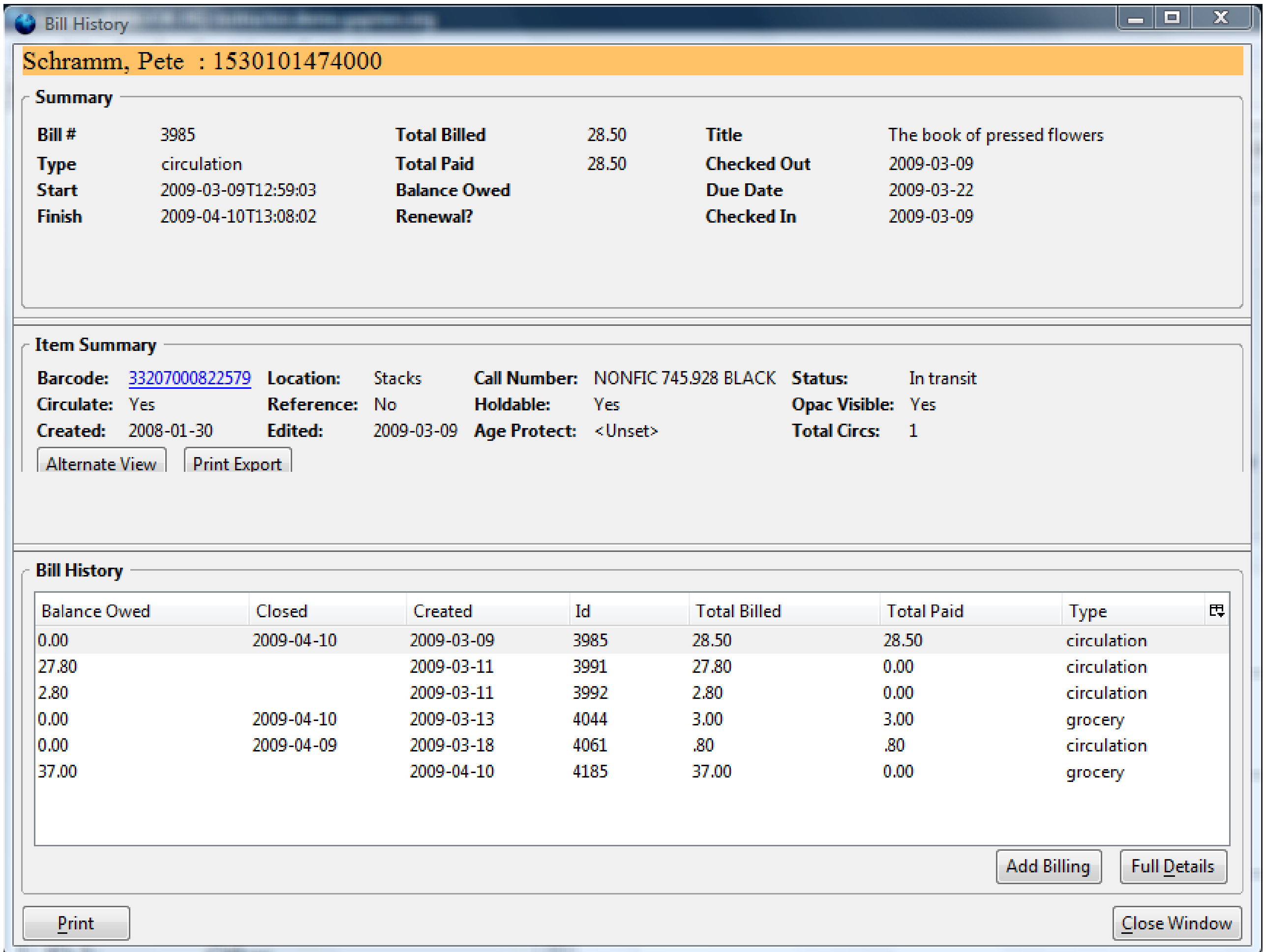


Figure 101 Forgiven Payment type in the Payments Pane

Voiding Bills

When Bill Has Been Previously Paid --To void a bill, first search for the bill in the customer's bill history.



Highlight the bill in question and click on *Full Details* Figure 102.

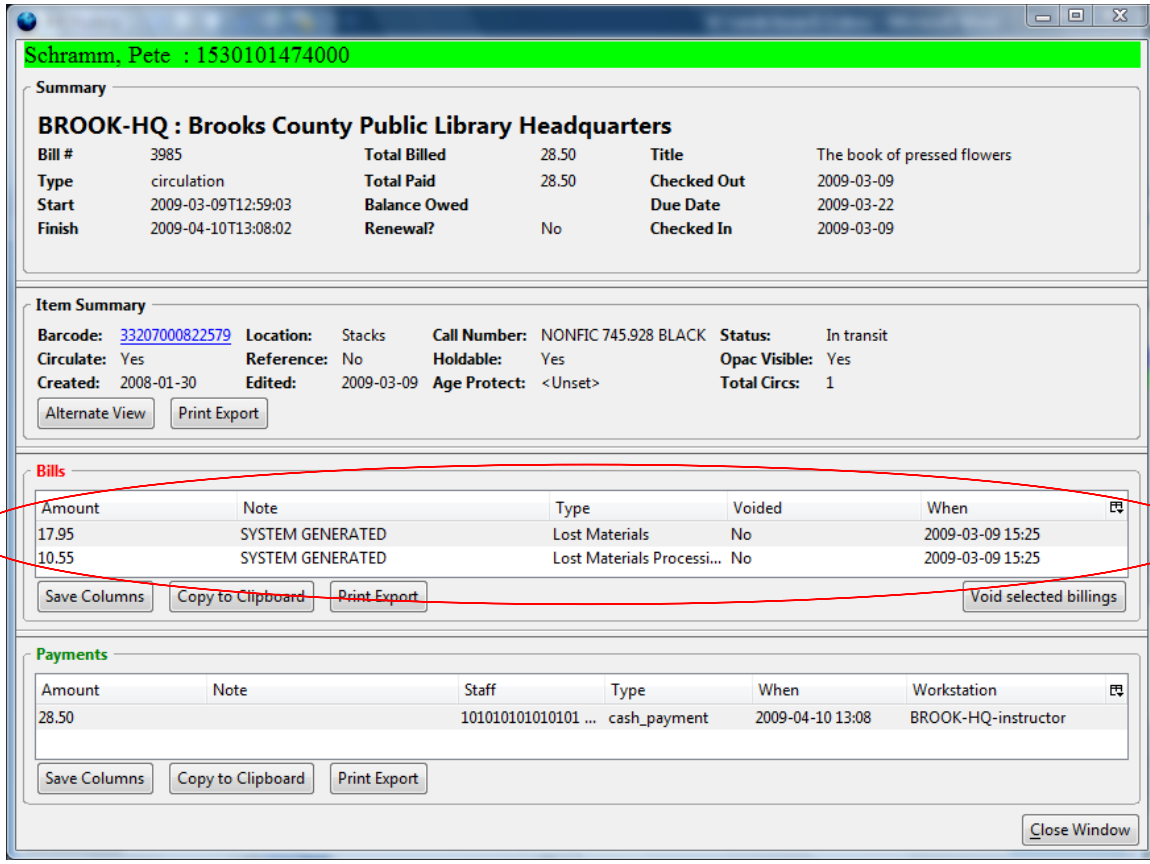
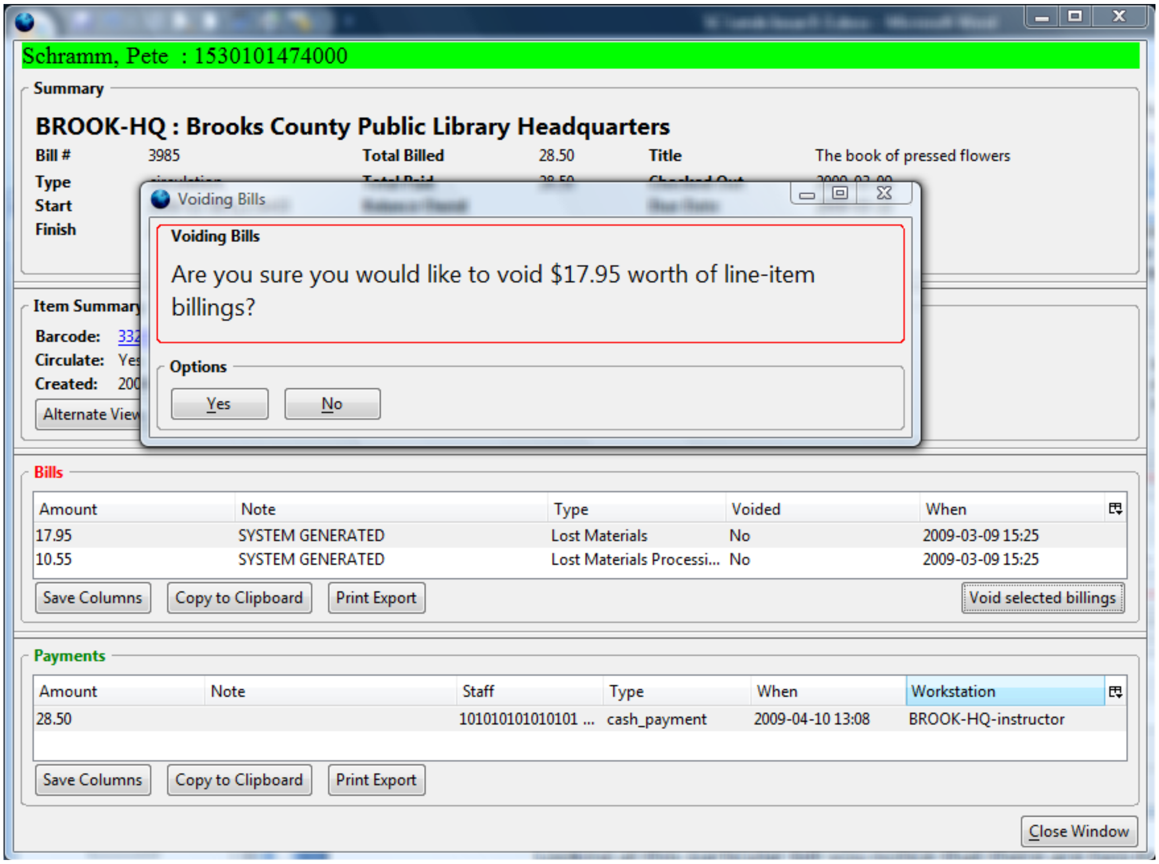


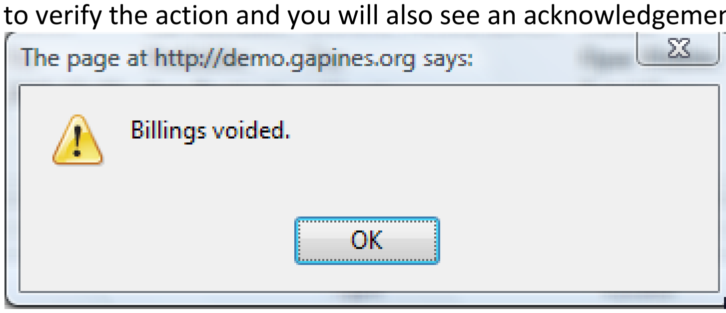
Figure 102 Viewing Customer Bill History Details

Looking at this particular bill you notice that there are two items on this bill—a replacement cost and a reprocessing fee. Following this example a little further, assume the customer has found the book and returned it to the library. They are eligible for a refund of the lost material charge but no refund will be given for the reprocessing fee. In general, you may choose to void one or both bills by highlighting the ones to be voided. In this case we are going to void the Lost Materials charge only.

Highlight the Lost Materials charge and click on *Void Selected Billings*.



You will be asked to verify the action and you will also see an acknowledgement dialog box.



After you close the *Details* and *History* Windows you will see that the customer's bill window has been refreshed you will see that the amount was voided Figure 103. In this case the customer still has outstanding bill so the voided amount is applied towards their remaining balance.

If the customer had no other bills then Evergreen would have shown that the voided amount is now a *Balance Owed* and a *Refund* button will appear on the screen. In the case of a balance owed, click on the *Refund* button, and the amount to be refunded will appear in the *Change* field. Click on *Apply Payment* and give the customer back their money.

NOTE: If the customer has outstanding bills, the refund will be applied to those bills before it shows up as a balance owed. If there is more owed than the value of the refund, the customer will still owe money. To avoid confusion, it is a good idea to point this out to the customer before you void the payment.

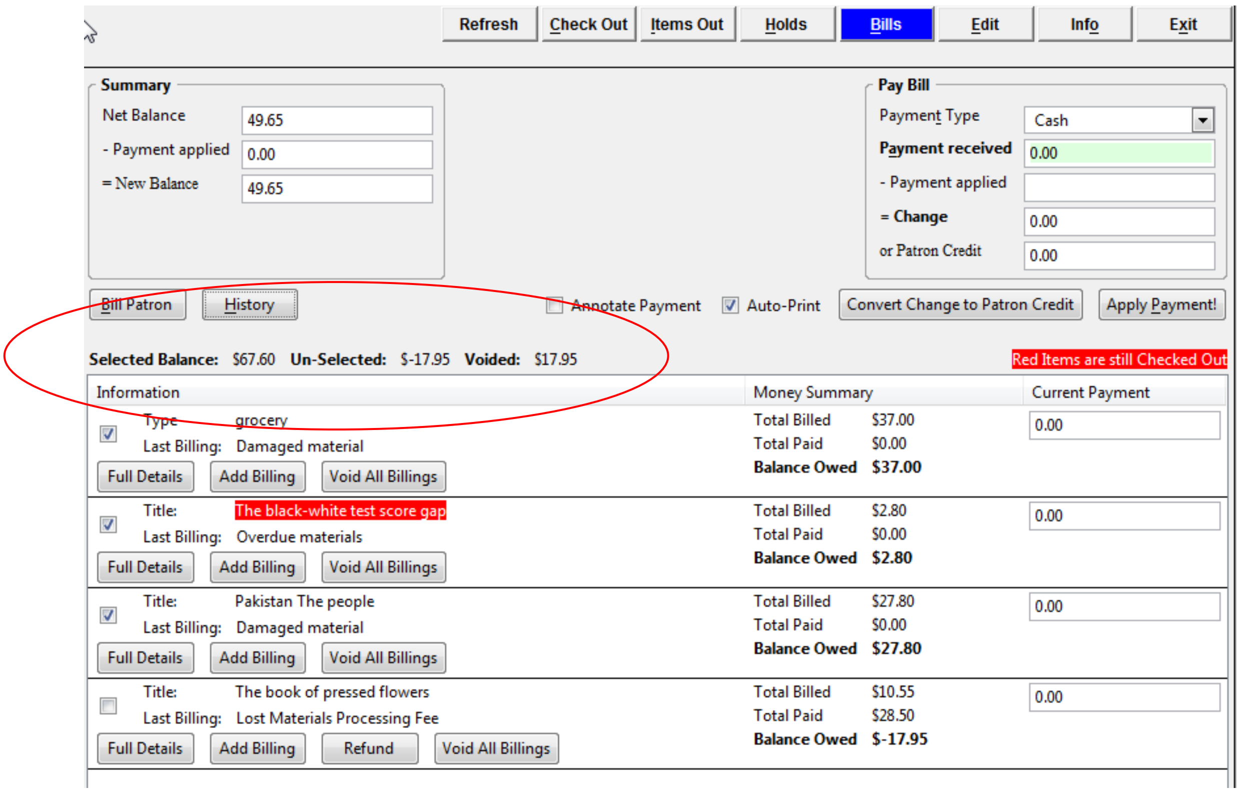


Figure 103 Updated Bill window showing a voided amount

When Bill Has Not Been Paid--On the Customer's *Bills* window, one option under each bill is to *Void All Billings (Void All Billings* is referring to all bills associated with **one** multi-part bill). Click on the *Void All Billings* command button to cancel the bill, without taking or refunding a payment. If a bill has several parts, click on *Full Details*, highlight the parts you need to void and select *Void Selected Billings*.

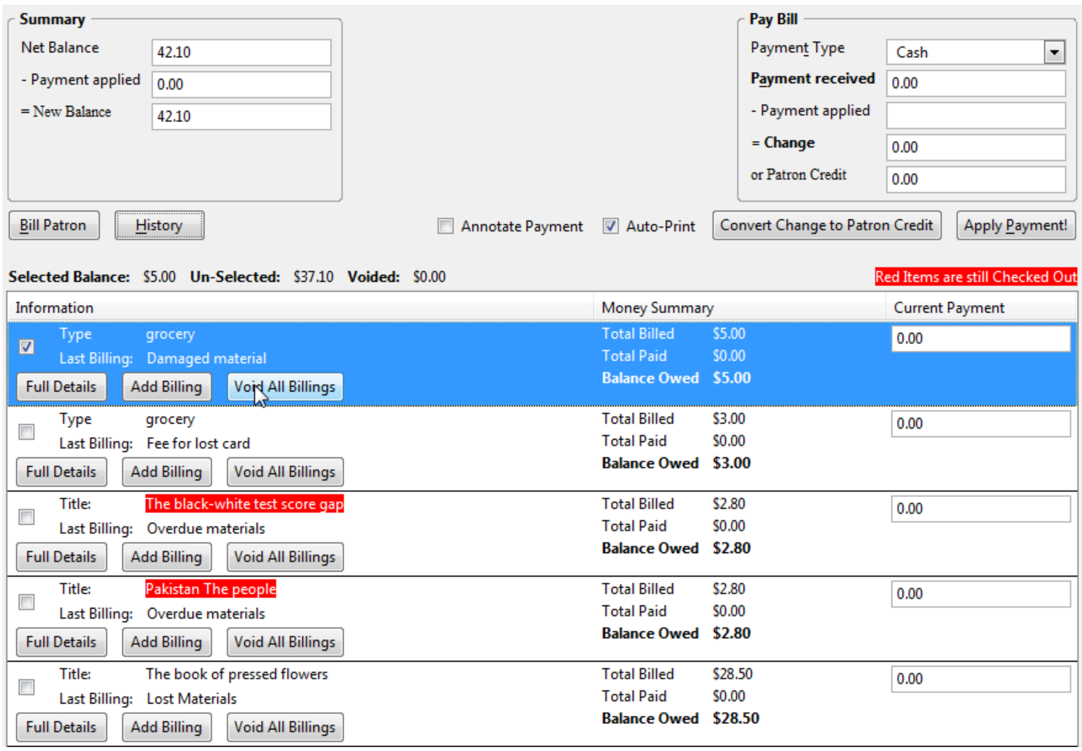
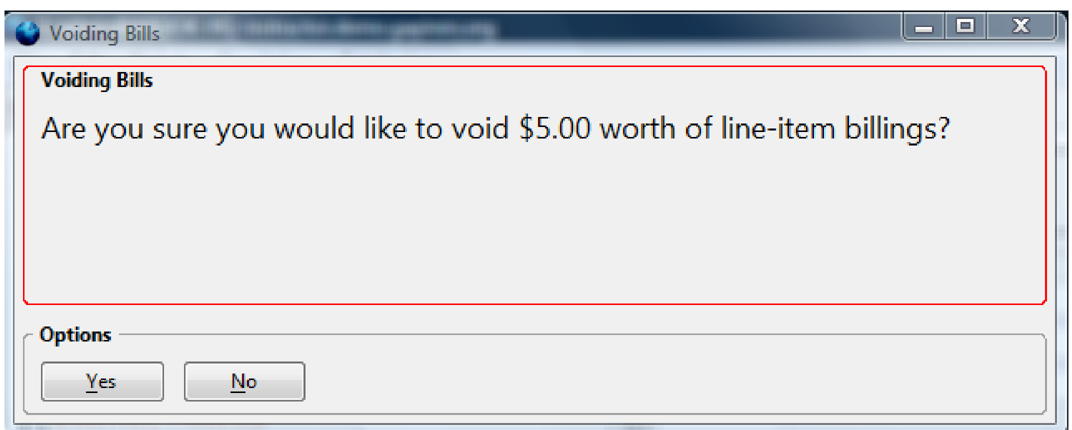
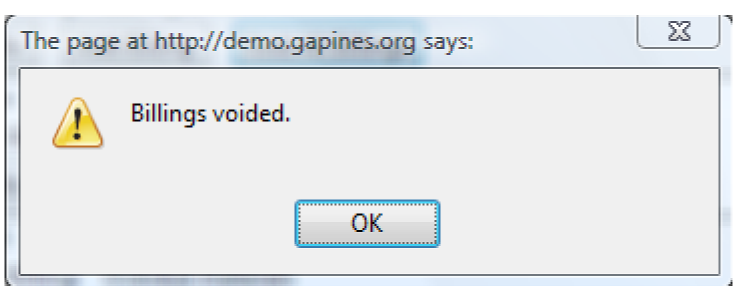
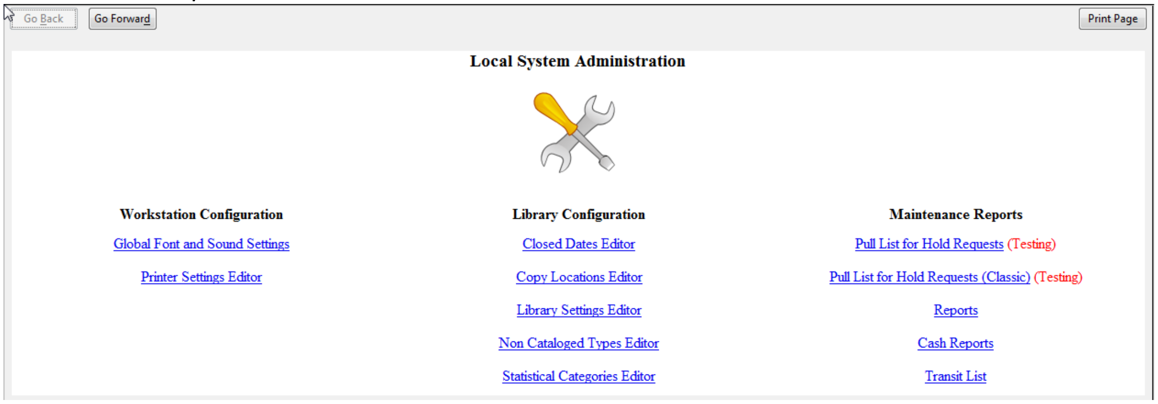


Figure 104 Voiding a Bill that has not yet been paid





Effects Of Voids On Cash Reports--Whenever the void results in a refund, that money will be subtracted from the running total on the Cash Report. The Cash Report is viewed by clicking on the *Admin* button on the upper right of the toolbar, clicking on *Local System Administration* and then on *Cash Reports*.



Chapter 5 Holds

Overview

SC Lends has three types of holds:

1. System Hold: A request a customer places for an item at a branch of his or her home library.
2. Intra-Consortium Hold (ICL): A request a customer places for an item from another library within the SC LENDS consortium.
3. Interlibrary Loan (ILL): A request a customer places for an item held at a library outside the SC LENDS consortium.

SC LENDS libraries will share all materials older than six-months except for non-circulating items If customer requests an item that is already checked out, you can place a hold from the Evergreen client software, or the public may place a hold through the OPAC. When a hold is placed, Evergreen creates a Hold record that links the item and the customer.
Hold records contain the following information about the item:

- User who placed the hold
- Library where the hold was placed
- Pickup library
- Date and time the hold was placed
- Hold level and range

When more than one customer places a hold on an item, Evergreen creates a hold list (queue). Any number of customers can wait in the hold queue. Evergreen uses the information in Hold records, Hold policies, Item policies, and User Profile policies to determine which customer in the hold queue receives the item when it becomes available.
When a hold is initially placed, the hold status is set to *Waiting for Copy*. Immediately Evergreen goes through and looks for an item which is eligible to fill the hold, called the target. If there is no eligible item, it will wait until one is returned or becomes eligible. When a particular item has been targeted, the customer's hold record shows that the hold has a status of *Waiting for Capture* and the barcode of the targeted item populates the *Current Copy* column. At the same time, the hold appears on the owning branch's *Pull List for Hold Requests*. Once an item is scanned in for capture, it either goes to the Holds shelf or is put in transit for the customer.
If there are no restrictions on holdability, the system will first look for an item at the hold's pickup library, then for an item in the hold's pickup region, then anywhere in the consortium. Within each category the holds are targeted randomly. The hold will stay on a target for 24 hours. If the targeted copy cannot be found, a staff person may indicate this in the staff client and a new target copy and location will be identified. Or if the target library does not act on the hold within a set interval, the hold will automatically retarget. Library staff may also monitor ICLs by running reports and redirecting those holds that could be filled by the home library.
The holds module is opportunistic, that is, if another eligible copy gets scanned in before the targeted copy, it will pick up the scanned in copy. Another feature of Evergreen called Hold stalling lets a library delay placing a customer's hold request for a given number of days--SC

Lends will be set to three days. The extra time means that the home library has more of a chance of filling a hold with its own collection.
The Holds queue is based on the time the holds was placed, subject to eligibility restrictions and is not priority based on the home library or region. The Holds queue may be viewed on the *Title Detail* page of the catalog record, by clicking on ***Actions for this Record > View Holds***.

Placing Holds

Press F3 or click ***Circulation***   ***Place Hold*** in the main menu, and search for the item (for information on Catalog Searching see Page 144) the customer has requested.

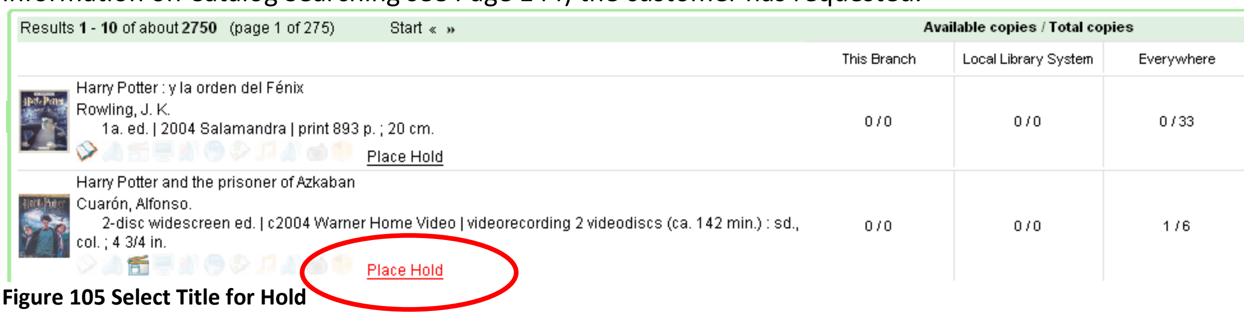


Figure 105 Select Title for Hold

Click on *Place Hold* from either the search results page or the item record.
Enter the customer's barcode number into the *Enter recipient barcode* field and click *Submit*.

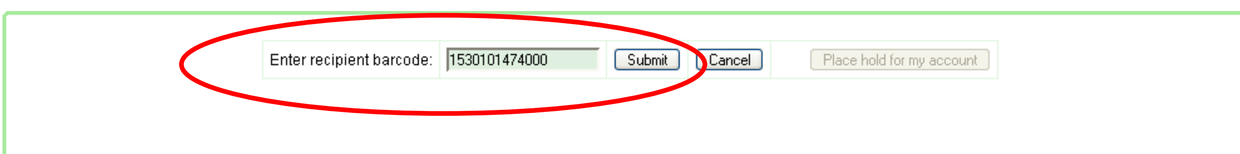


Figure 106 Tie the Hold request to a Customer

The *Create / Edit a Hold* page will display (Figure 107). The *Create / Edit a Hold* page displays information about the item being requested, the customer's contact information (editable email and phone number), and a dropdown box to select the preferred pickup location. This page also gives the option to *Suspend this hold* or select acceptable alternate formats via the *Advanced Holds Options* link. Click on the *Place Hold* command button at the bottom of the screen. A message will be quickly displayed: "Checking for possibility of fulfillment…" and if it is successful, there will be a message saying "Hold was successfully placed." Click on *OK*.
If the hold fails, a dialog box will open up indicating that the hold you are trying to place is invalid. For instance, if you try to place a hold on an audiovisual item where your library has no holdings, or if the customer has reached the limit of holds a person can place.

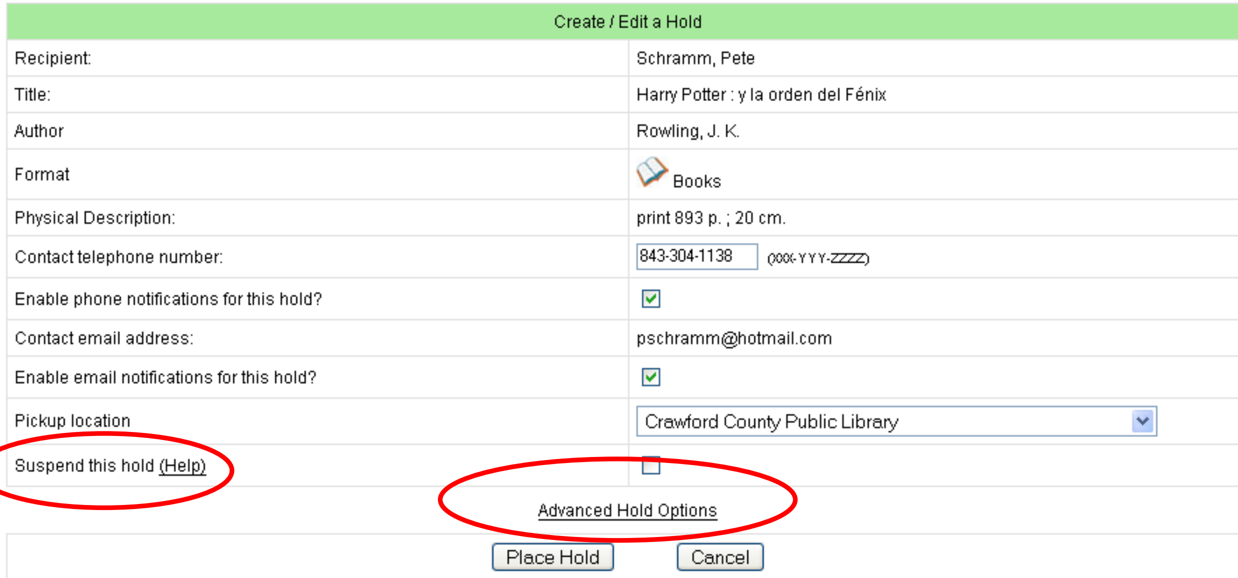


Figure 107 Place Hold Options

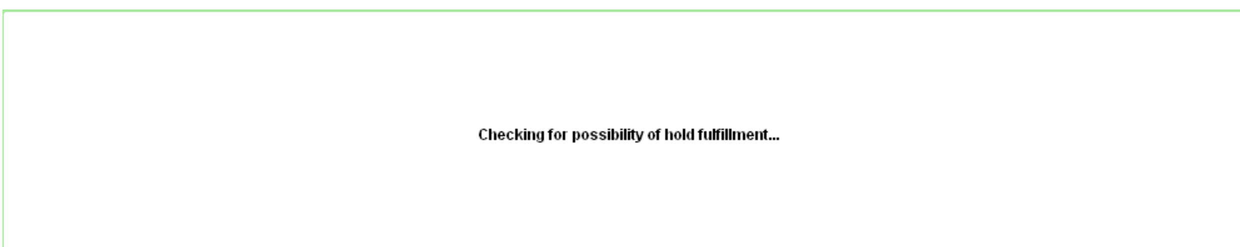
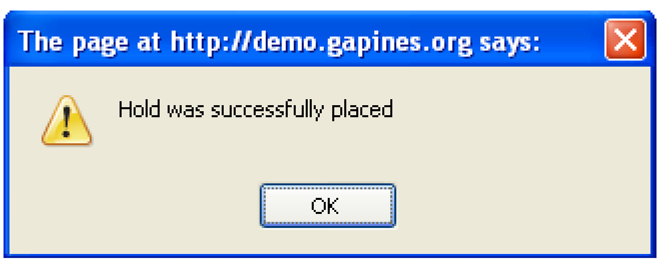


Figure 108 Evergreen's Checking for Hold Message



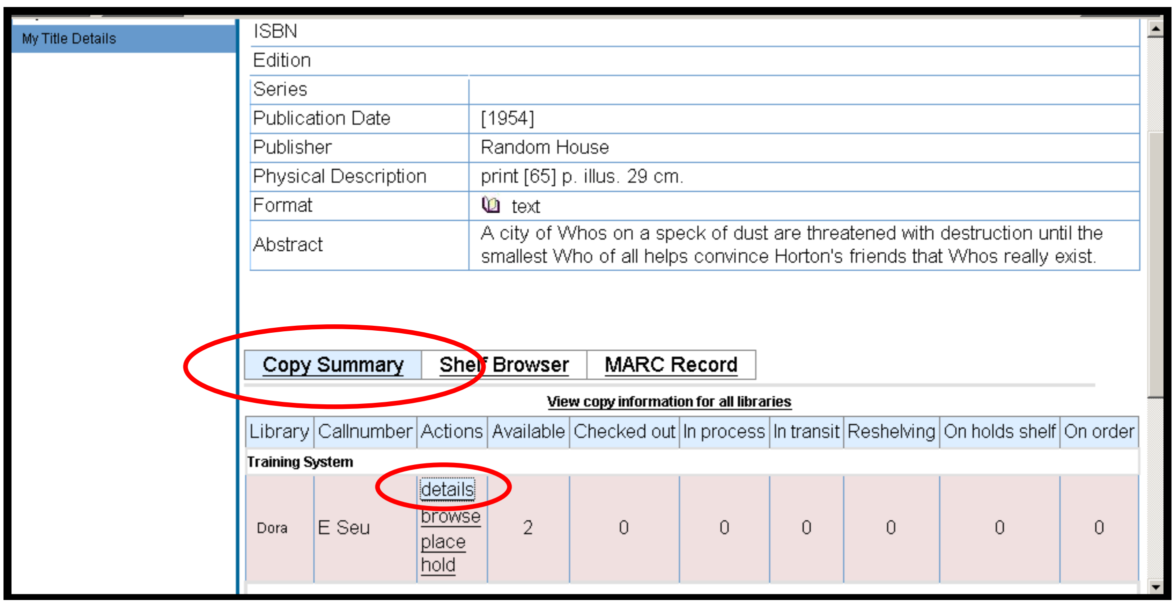
Evergreen Hold Types

Evergreen has four different types of holds:
Title level hold (T) refers to a hold which will be satisfied with the first available copy of a Title in the catalog. This type of hold is placed when a customer of staff person clicks on the *place hold* link next to a title (as in the previous example of placing a hold).
Copy Level hold (C) refers to a hold which will only be with a specific copy of a title in the catalog. This type of hold is placed when a staff person clicks on the details to view the specific item's barcode and then clicks *Place Hold* next to the barcode. **Note Customers cannot place a Copy level Hold**
Meta-record hold (M) refers to a hold for a catalog item that contains multiple iterations of an item, for example, different formats, different editions, and large print, as long as the title is the same. The first title in any format that is available will fulfill the hold request. This type of hold

is placed when a customer or staff person, from the *holds confirmation* screen, clicks on *Advanced hold options* and selects other applicable formats (use **Ctrl +left mouse** button to select multiple formats).
Volume level hold (V) refers to holds for catalog items that are volumes of a multipart work. This type of hold is placed when a customer or staff person, goes to the copy summary of a multipart work and views the copy summary. Select the volume/piece for a hold by clicking on *place hold* in the row of the selected piece.
The following sections illustrate examples of C, M, & V level holds.

Copy level Hold Example

To place a copy level hold, search for the catalog record, and in the Copy Summary portion of the window, click on *Details*.



The details for the item(s) appear. Click on *place hold* for an item.

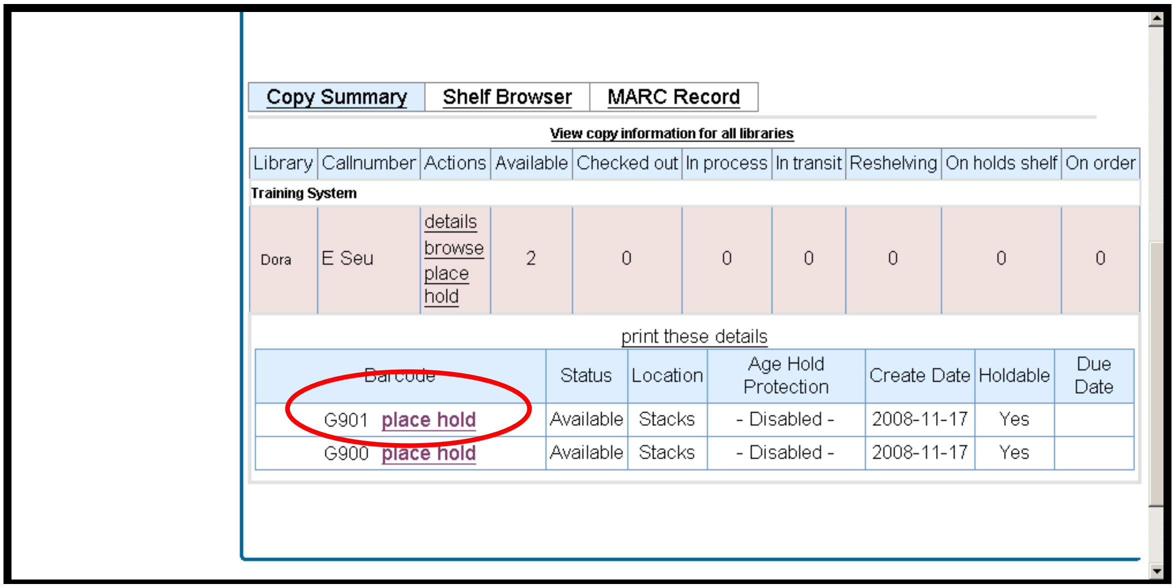
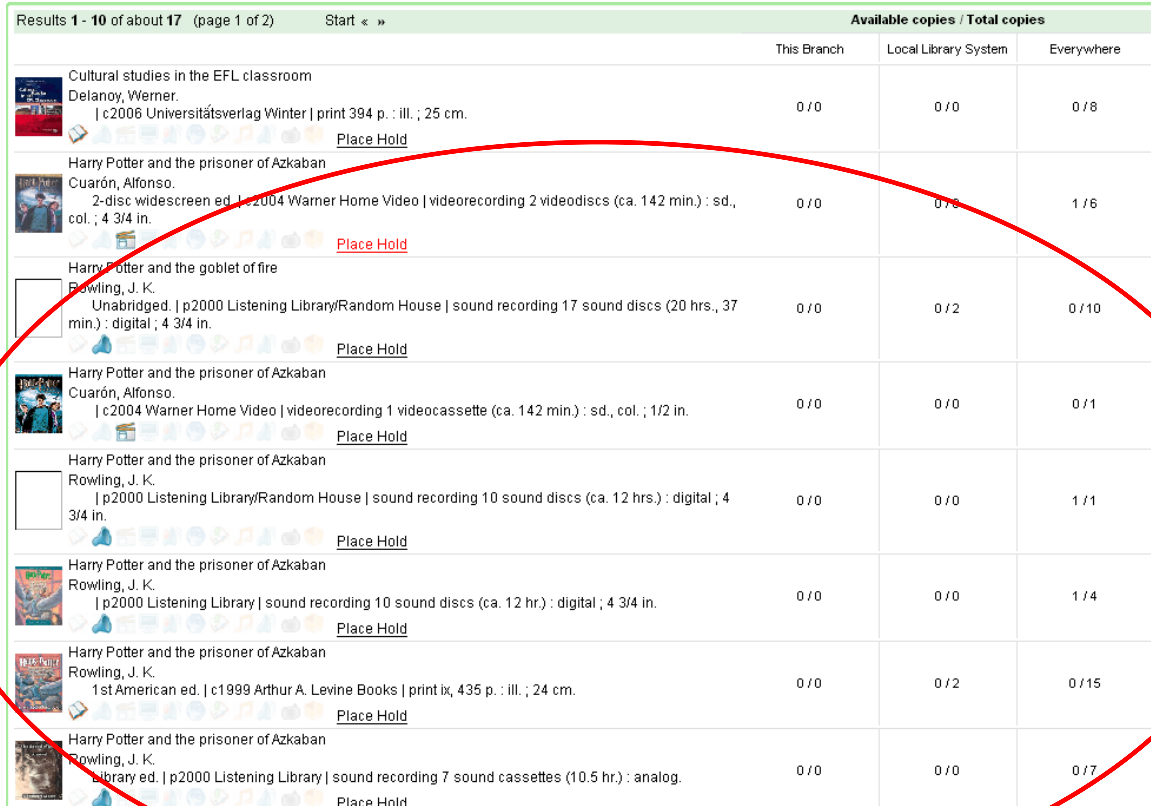


Figure 109 Copy Level Hold window

Meta-Record Hold Example

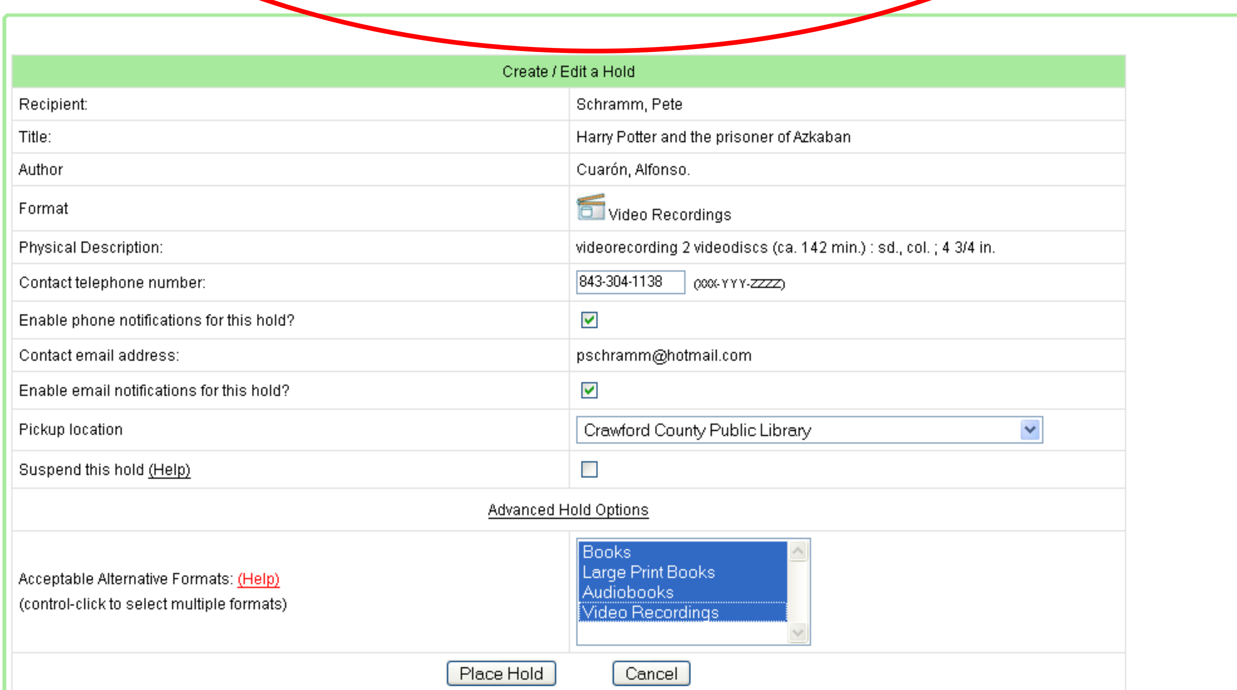
To place a meta-record hold, click on Advanced Hold Options (Figure 107) and holding down the control key, select one or more formats from the list displayed.
For example, referring to Figure 110 there are multiple copies of “Harry Potter and the prisoner of Azkaban in three different formats. A customer wants the first available copy in **any** format. Place a hold on any of the records by first clicking on *Place Hold* on the record screen for any of the copies. From the *Create/Edit a Hold* window, click on the *Advanced Hold* Options link. A list of alternative formats appears via a drop-down menu. Hold down the control key and select all the formats of the work, then click on the *Place Hold* command button (Figure 111).



Results **1** - **10** of about **17** (page 1 of 2) Start « »

	Available copies / Total copies This Branch	Local Library System	Everywhere
Cultural studies in the EFL classroom Delanoy, Werner. | c2006 Universitätsverlag Winter | print 394 p. : ill. ; 25 cm. Place Hold	0 / 0	0 / 0	0 / 8
Harry Potter and the prisoner of Azkaban Cuarón, Alfonso. 2-disc widescreen ed. | c2004 Warner Home Video | videorecording 2 videodiscs (ca. 142 min.) : sd., col. ; 4 3/4 in. Place Hold	0 / 0	0 / 0	1 / 6
Harry Potter and the goblet of fire Rowling, J. K. Unabridged. | p2000 Listening Library/Random House | sound recording 17 sound discs (20 hrs., 37 min.) : digital ; 4 3/4 in. Place Hold	0 / 0	0 / 2	0 / 10
Harry Potter and the prisoner of Azkaban Cuarón, Alfonso. | c2004 Warner Home Video | videorecording 1 videocassette (ca. 142 min.) : sd., col. ; 1/2 in. Place Hold	0 / 0	0 / 0	0 / 1
Harry Potter and the prisoner of Azkaban Rowling, J. K. | p2000 Listening Library/Random House | sound recording 10 sound discs (ca. 12 hrs.) : digital ; 4 3/4 in. Place Hold	0 / 0	0 / 0	1 / 1
Harry Potter and the prisoner of Azkaban Rowling, J. K. | p2000 Listening Library | sound recording 10 sound discs (ca. 12 hr.) : digital ; 4 3/4 in. Place Hold	0 / 0	0 / 0	1 / 4
Harry Potter and the prisoner of Azkaban Rowling, J. K. 1st American ed. | c1999 Arthur A. Levine Books | print ix, 435 p. : ill. ; 24 cm. Place Hold	0 / 0	0 / 2	0 / 15
Harry Potter and the prisoner of Azkaban Rowling, J. K. Library ed. | p2000 Listening Library | sound recording 7 sound cassettes (10.5 hr.) : analog. Place Hold	0 / 0	0 / 0	0 / 7

Figure 110 select any item that matches the title



Create / Edit a Hold	
Recipient:	Schramm, Pete
Title:	Harry Potter and the prisoner of Azkaban
Author	Cuarón, Alfonso.
Format	Video Recordings
Physical Description:	videorecording 2 videodiscs (ca. 142 min.) : sd., col. ; 4 3/4 in.
Contact telephone number:	843-304-1138 (XXX-YYY-ZZZZ)
Enable phone notifications for this hold?	☑
Contact email address:	pschramm@hotmail.com
Enable email notifications for this hold?	☑
Pickup location	Crawford County Public Library
Suspend this hold (Help)	☐
Advanced Hold Options	
Acceptable Alternative Formats: (Help) (control-click to select multiple formats)	Books Large Print Books Audiobooks Video Recordings
Place Hold	Cancel

Figure 111 Advanced Holds Option selection for an M level hold

Volume Level Hold Example

To place a volume hold, go to the *Copy Summary* of a multipart work (Figure 112) and view the copy summary. Select the volume/piece for a hold by clicking on the *place hold* link in the row of the selected item.

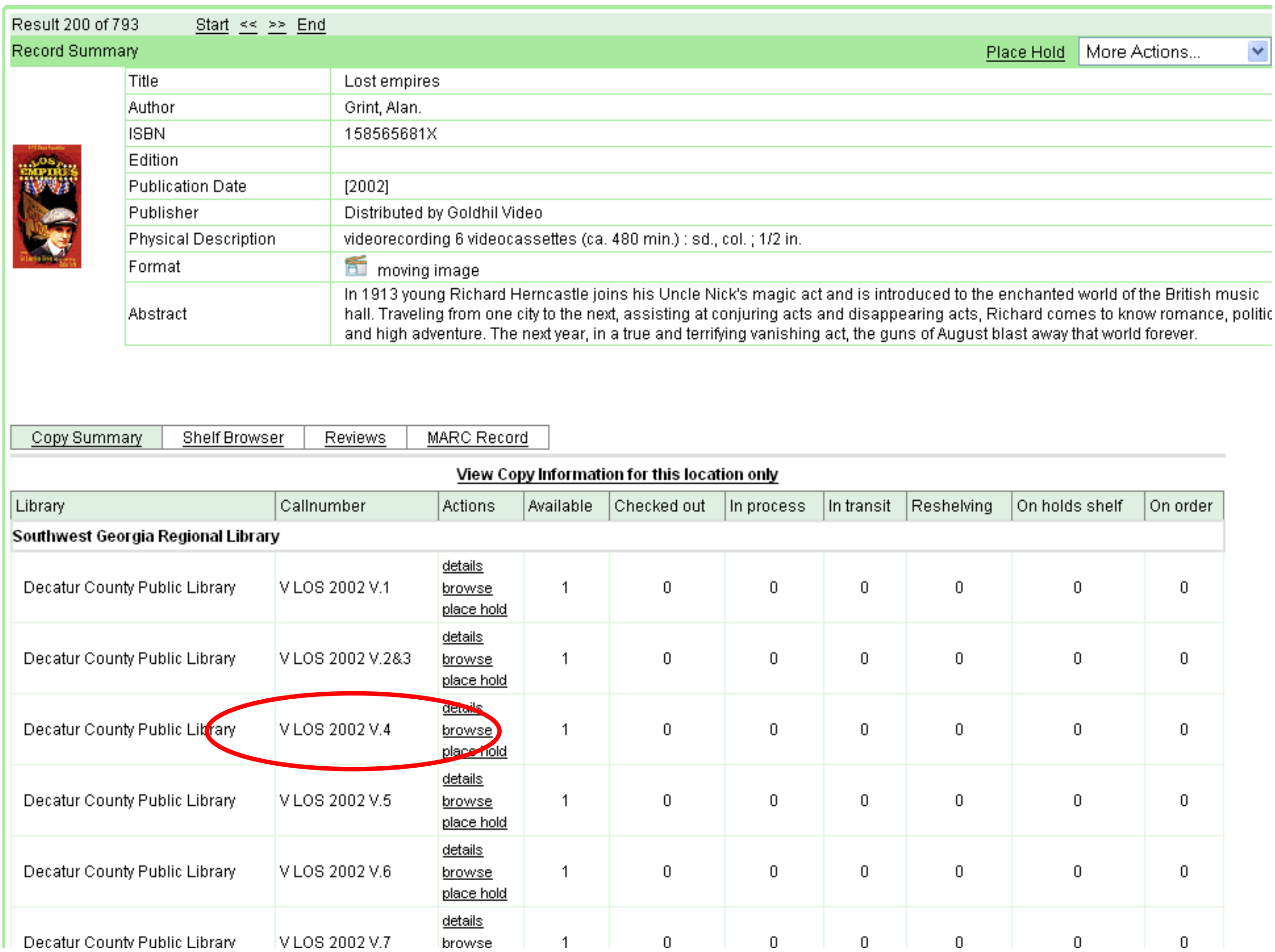
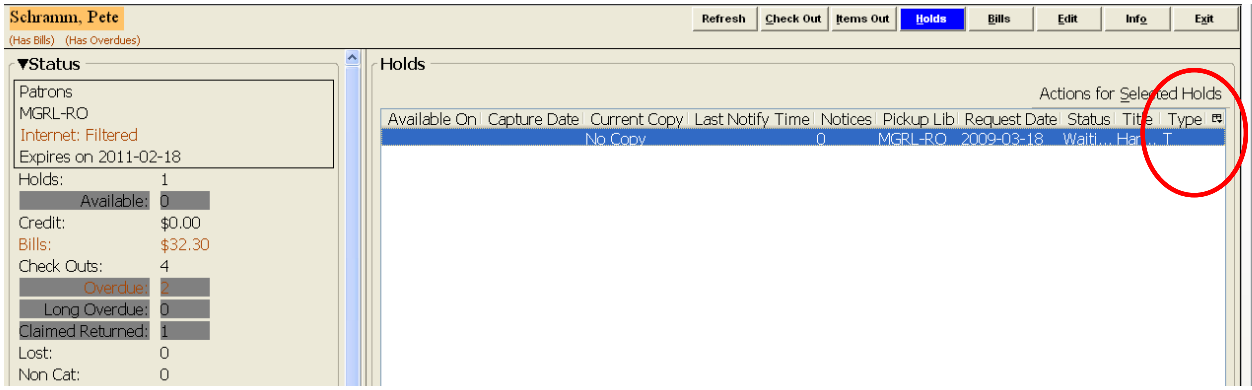


Figure 112 Multi-part catalog item

Review Customer Holds

Retrieve the customer's record and click on the *Holds* command button on the navigation toolbar.



Notice that in this example the *Type* field contains a T (i.e., Title Level Hold). The *Type* field refers to the type of hold placed (options are T, C, M, V). Refer to Page 108 for more information about the various types of holds.

If a customer places a hold for a title for which all copies are checked out, the following happens.

The hold is placed in a queue to hold the first copy that is checked in.

As soon as a copy is checked in, a slip is generated for "on hold" for the local branch or "in transit (Figure 113) for another branch.

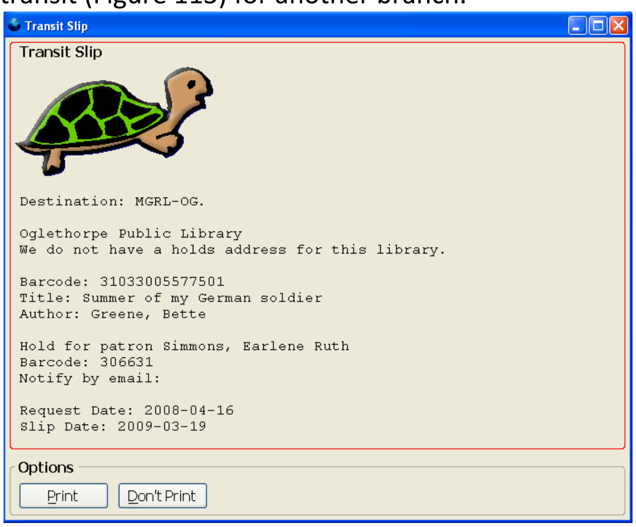


Figure 113 Transit Holds Slip

Viewing Holds Queue Order

If a customer asks for their current position in the holds queue you can provide them this information via Evergreen. Starting from the customer record click on the *navigation toolbar > Holds* button—displaying the customer's hold requests(Figure 114). Next, click on ***Actions for Selected Holds > Show in Catalog.*** This will open the title in the catalog record screen (Figure 115) where you need to click on the drop down link ***Actions for this Record > View Holds***. This will open the final window, *Holds* which will show the outstanding holds on the title. The default ordering is with the oldest hold (next in line) at the bottom. Use the Column Manager icon to open the options for managing the displayed information. For example, Figure 116 shows the list options where you can choose an option to display the Customers' names etc.

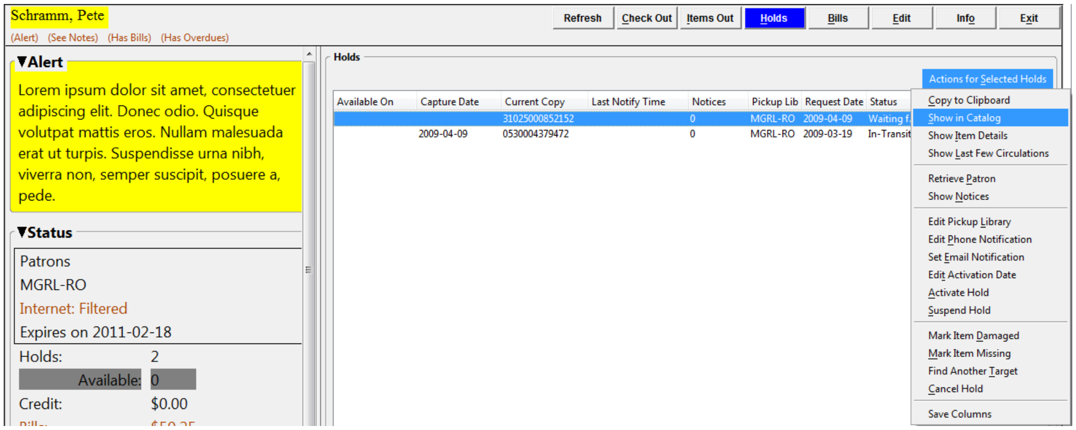


Figure 114 Finding a Customer's Holds Listing

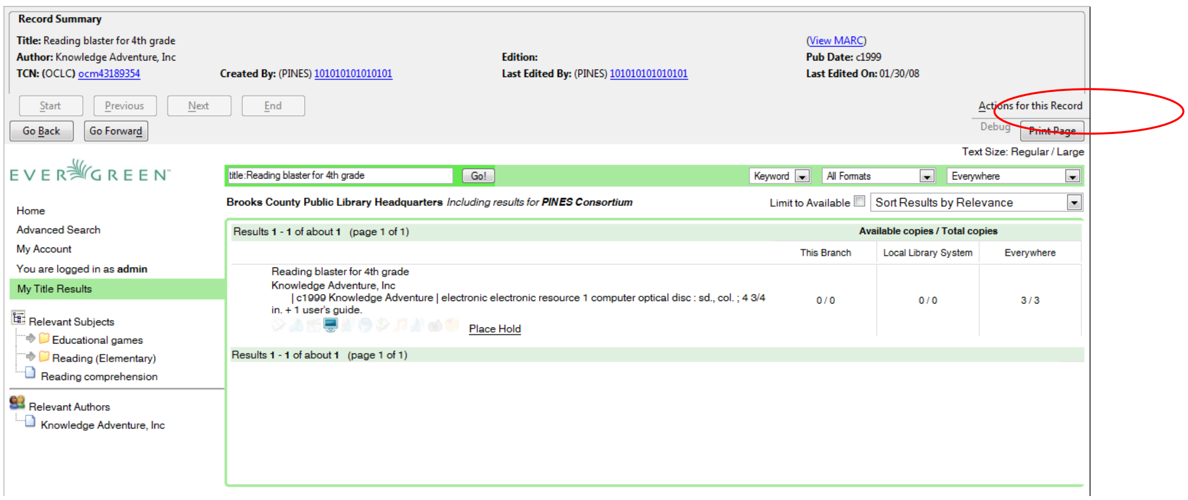


Figure 115 Title Hold Action

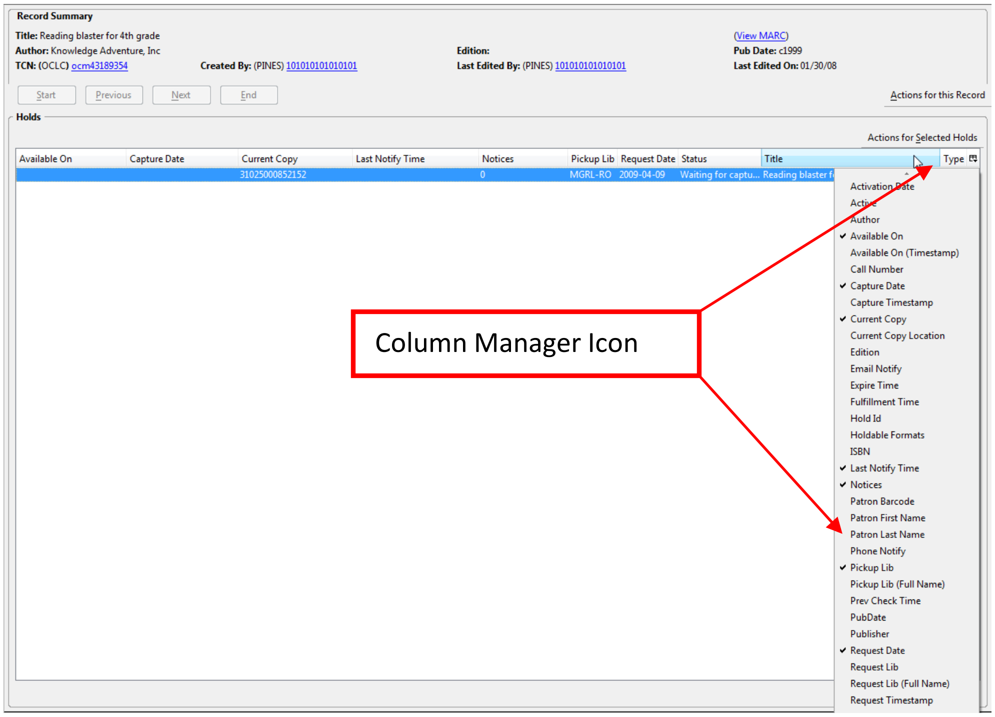


Figure 116 Add Customer's Name to the Holds Queue Display

Suspend a Customer Hold

If the status of a hold is *Ready For Pickup*, it is possible to cancel the hold; however, it is not possible to suspend the hold.
Holds can be suspended either by customers or staff. In either case, the process is the same if the hold were suspended while in the process of creating the hold request. The customer record screen, where the hold is placed, contains a checkbox labeled *Suspend Hold* (Figure 117). Once this box is checked off, the hold can be suspended until the date that the customer or staff sets for reactivation. Clicking on the calendar icon will bring up a calendar gadget where the date can be set. The date can also be manually entered. **If the date field is left blank the hold is suspended indefinitely until the reactive date is set.**

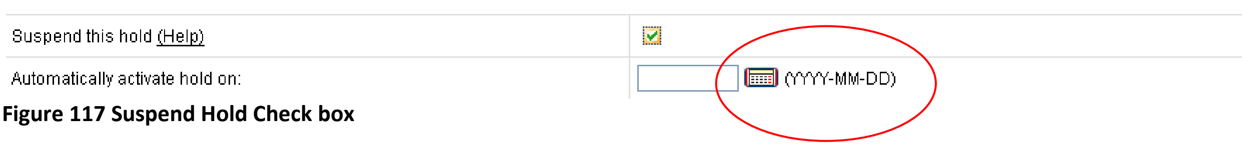


Figure 117 Suspend Hold Check box

Reactivating a Customer Hold

Library staff can reactivate holds in the following manner. Retrieve the Customer record and click on the *Holds* command button on the navigation toolbar. Highlight the hold to be reactivated and click on *Activate Hold* from the drop-down menu under *Actions for Selected Holds*. (Figure 118)

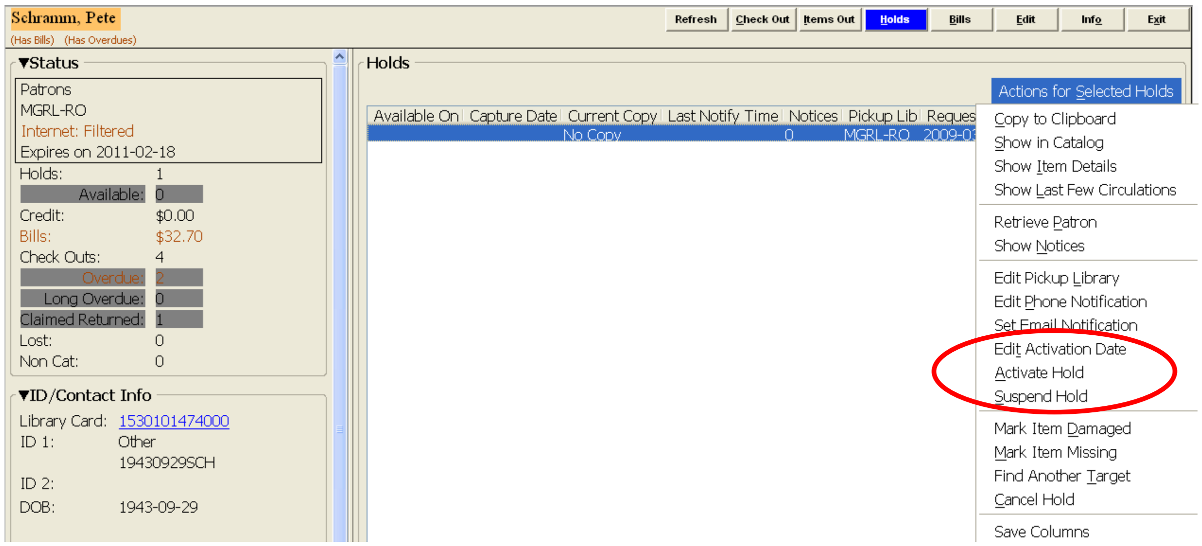
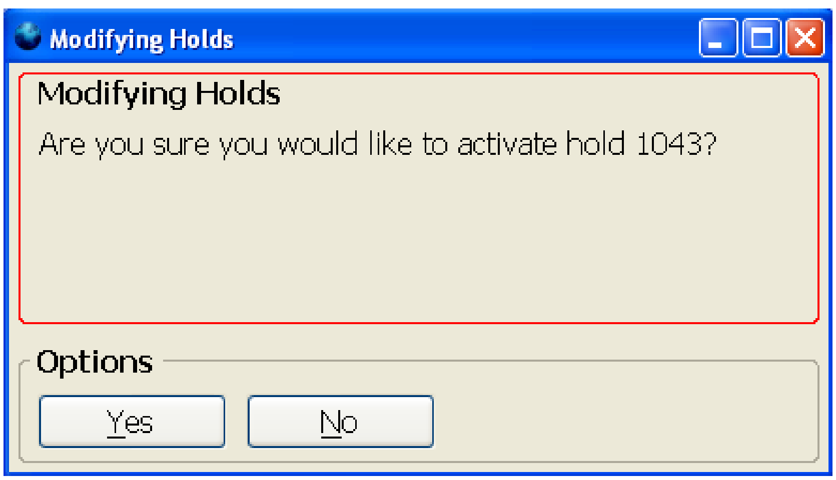


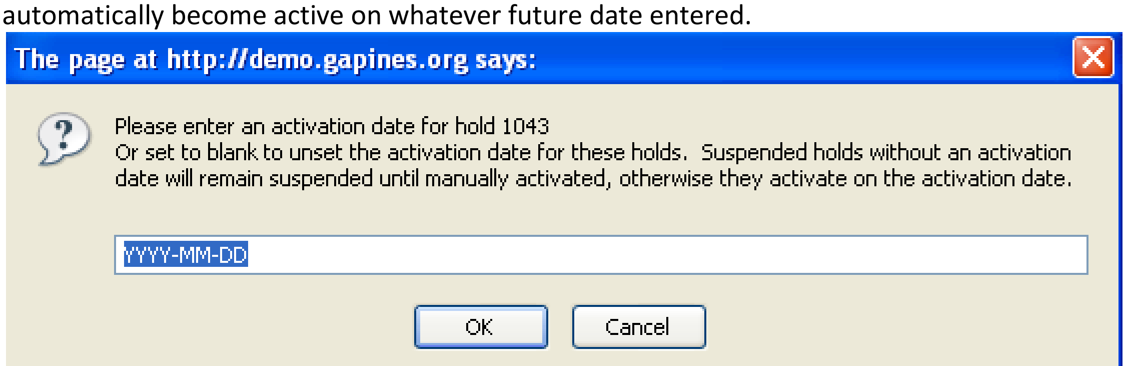
Figure 118 Reactivating a Hold

Evergreen will prompt you to confirm that you want to activate the Hold. Click *Yes*. The hold is activated immediately.



Setting an Activation Date

As an alternative to reactivating a hold immediately you can us the *Edit Activation Date* feature. From the *Actions for Selected Holds* drop down choose *Edit Activation Date* (Figure 118). Evergreen will display a dialog box where you must enter a date YYYY-MM-DD. The hold will automatically become active on whatever future date entered.



Note: Customers can place Holds from OPAC. In the process of setting a hold they may also **inadvertently** suspend a Hold. To see if a hold is active or not click on the *Column Manager* icon and add the *Activation Date* and *Active Date* column headings. In the following example, the record is showing “None” for the *Activation Date* and “No” for *Active*. An Active hold will be indicated with a “Yes” in the Active Column. A Hold does not need and Activation date if it is Active, but if the Hold is Not Active then the hold will remain inactive until manually activated (no date) or automatically activated when an Activation date is reached.

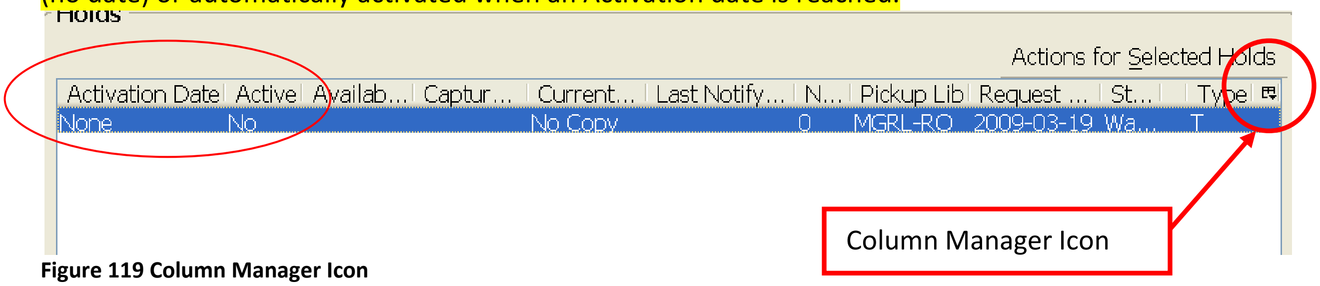


Figure 119 Column Manager Icon

Remove Customer Holds

Often, a customer may call in and ask you to cancel a hold for them. While they can do this from the online OPAC, this may not always be possible for the customer.
To cancel holds from the staff client, first click ***Search > For Patrons***. Follow the above procedure to review Customer Holds (Page 112). Select one or more holds from the customer list and click on *Actions for Selected Holds*. From the drop down choose *Cancel Hold*. The system will prompt you to confirm your request to cancel the Hold(s). Click *Yes* to complete the operation.
You can edit holds from a customer's list of holds up until the time the item is put in transit.

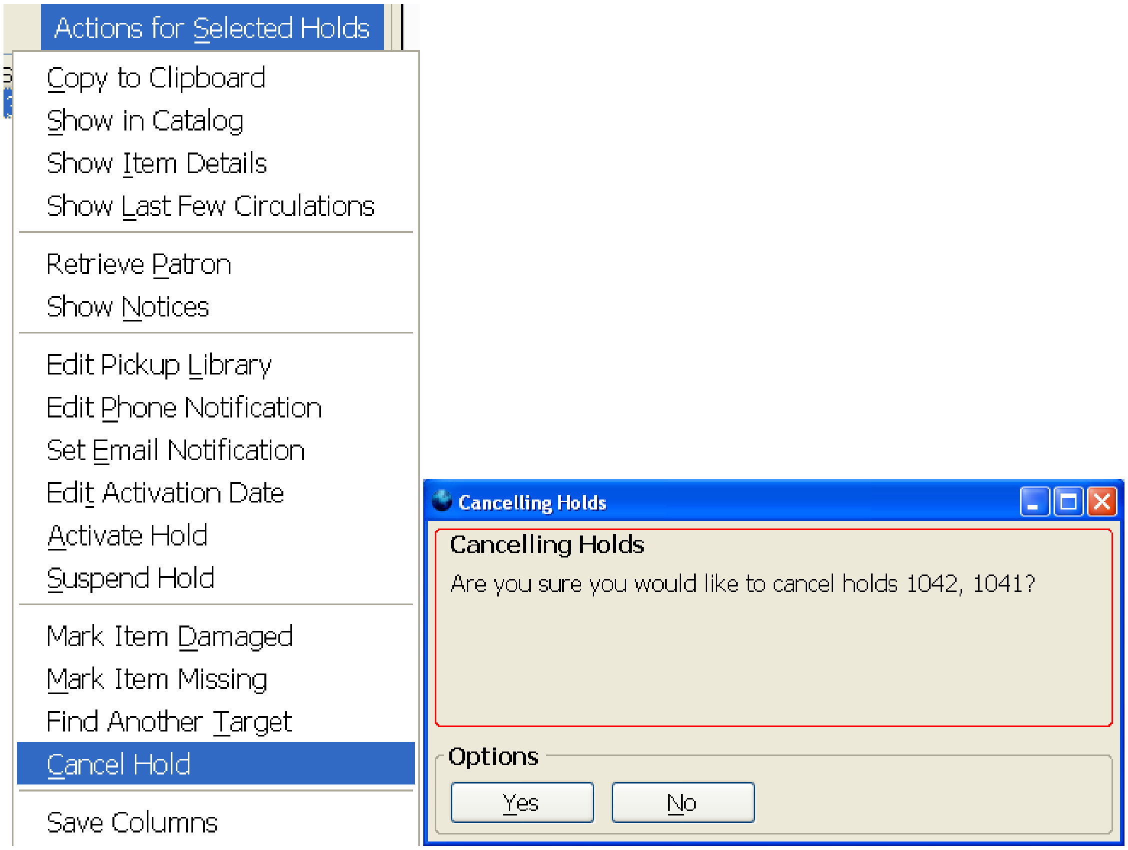


Figure 120 Cancel Holds Action

Retargeting Holds

Occasionally, a hold may be captured or placed on the holds pull list only to find that the item is damaged, lost, etc. or perhaps is newer than 6 months and cannot be put in transit. In these instances, holds can be retargeted to another library.

Begin by retrieving the customer, either by barcode or by a name search.

After retrieving the customer account, click the Holds command button. This will display all holds currently placed by this particular customer. In the case in Figure 121, we see the item *Waiting for a copy*.

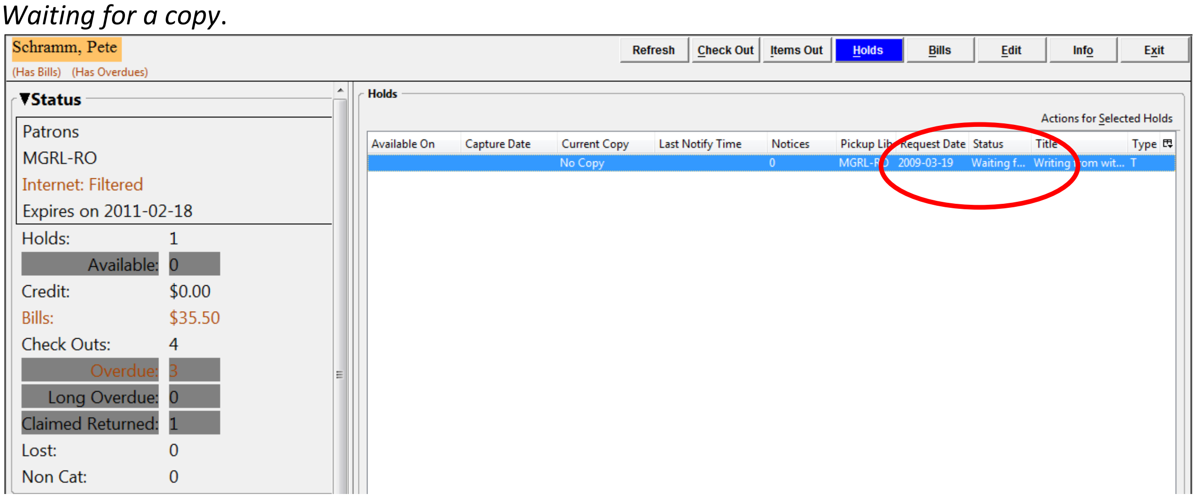
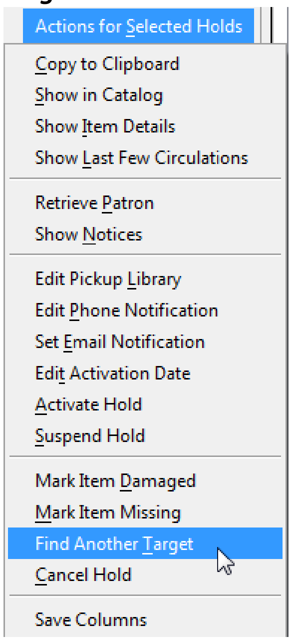
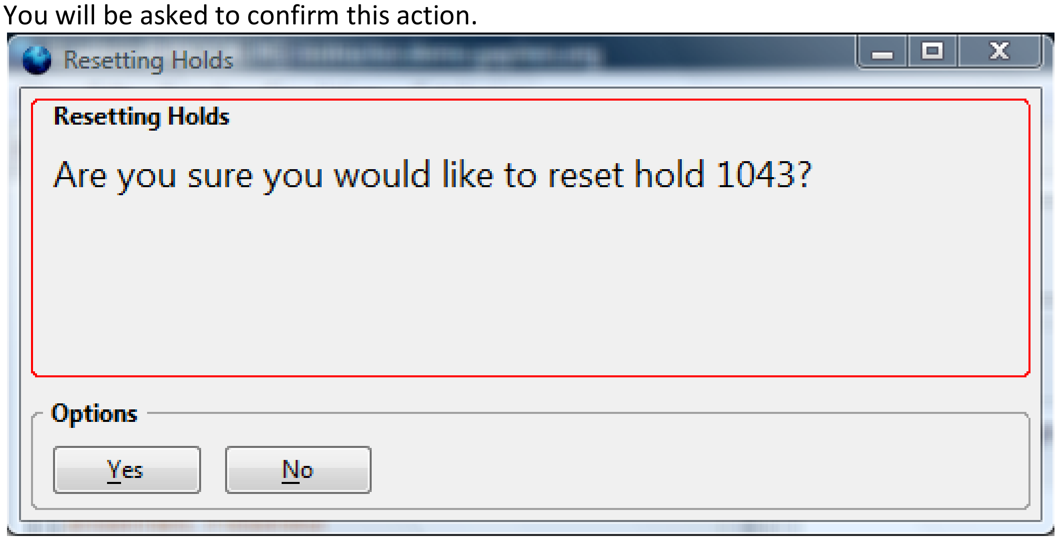


Figure 121 Customer Holds List

To retarget this hold, highlight the item and click ***Actions for Selected Holds > Find Another Target***.



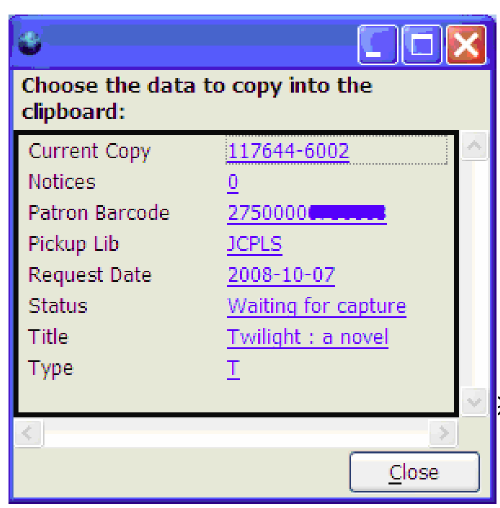
You will be asked to confirm this action.



After confirming, the *Status* will change to *Waiting for copy* and will now appear on the next available library's *Hold Pull List.*

Transferring Holds

To transfer holds from one item to another, open the record you need to transfer the hold from in one tab and the record you need to transfer the hold to in another tab. First view the holds on the record where the hold is currently. You will copy the customer barcode of the hold you need to move. Select *Patron Barcode* in the Column Manager. Then right-click on the line you need, and select *Copy to*



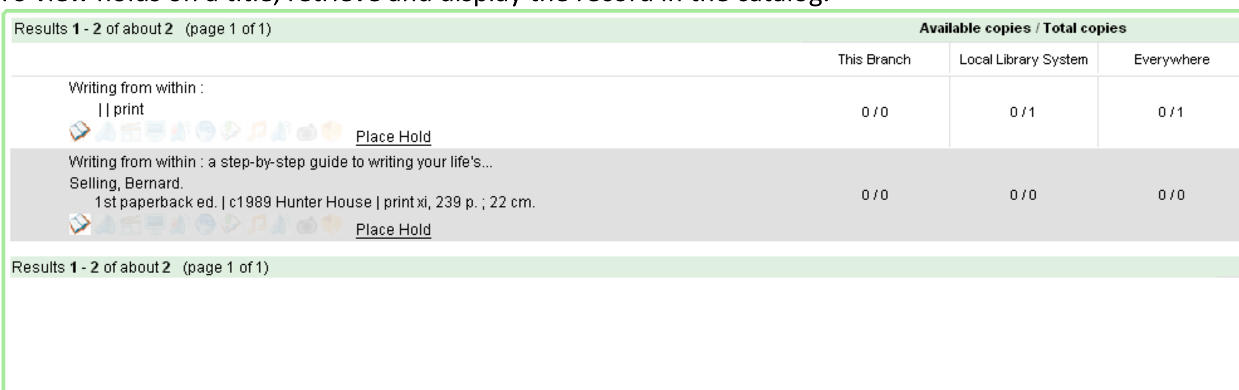
Clipboard. A box will open up with data from that line. Click on the customer barcode. Make sure you do not click on the item barcode, if it is in your box. A box will open up telling you what has been copied to the clipboard.

Click *OK* or press *Enter*. You can now use this customer barcode to place a hold. Go to the tab where you have opened the record where you need to move the hold. See Placing Holds on page 107, if needed, for instructions on how to place the hold. Then you will need to cancel the hold on the first record.

Note Evergreen will automatically accept another barcode if that item barcode is attached to the same bib record.

View Item Holds

To view holds on a title, retrieve and display the record in the catalog.



Click on the title to retrieve *Record Summary* window and select ***Actions for this Record > View Holds***.

Notice in Figure 122 that when the Hold record is retrieved you may have to use the Column manager to adjust the display information (e.g., Customer barcode, name, etc).

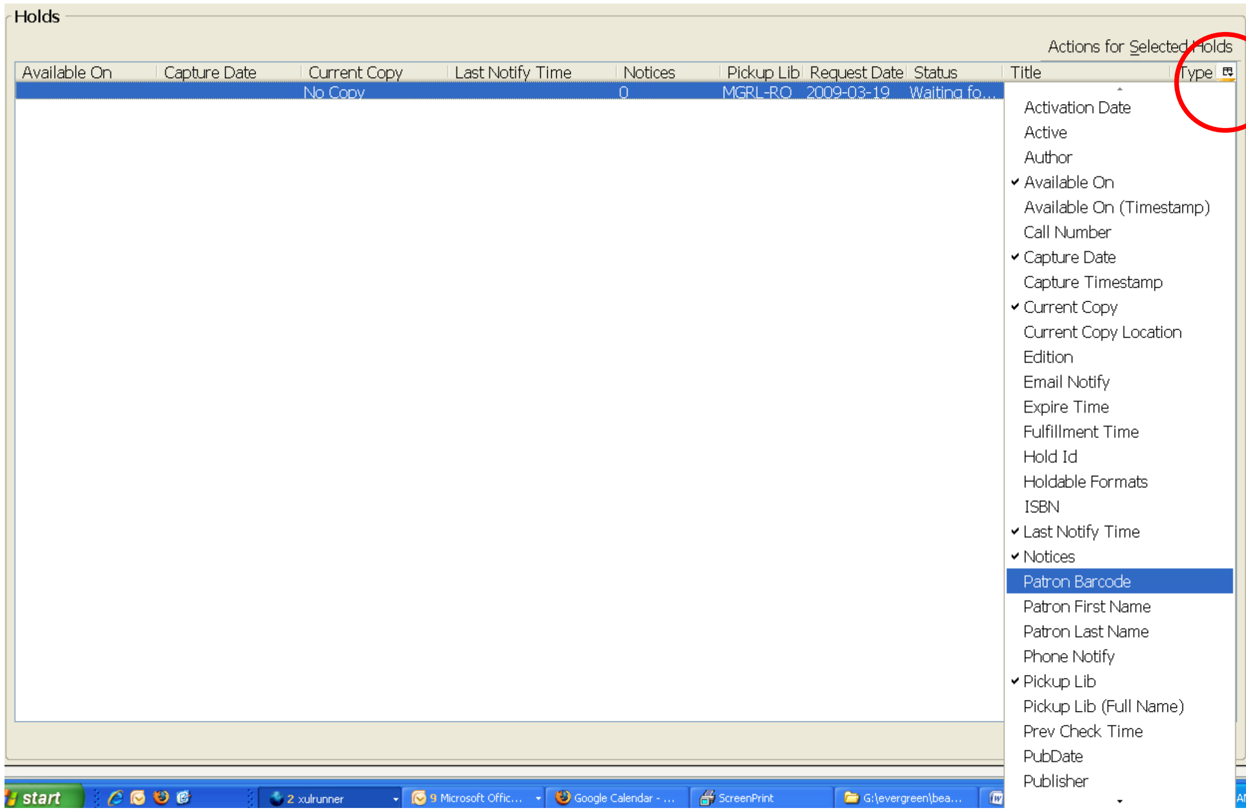


Figure 122 Hold Display fields

A hold with a status of waiting for capture means the hold has been assigned a barcode already and is on a library's holds list.
A hold with a status of waiting for copy means that the system is waiting for a copy to become available as all are currently checked out. Once the item is checked in, the hold is captured, and a slip is printed.

Branch Holds Processing

There are four steps for processing hold requests:

1. Print the Pull Holds report list of requests for items owned by the local branch.
2. Retrieve the matching items.
3. Trap the hold items which will automatically generate an email message to local branch customers or will generate "In Transit" slips for holds to be delivered to other branch locations.
4. Place the items on the local hold shelf or in delivery for other branches.

To understand how holds work in Evergreen after they are placed, a basic outline of the process is provided below.

Pull Holds Report List

Holds systematically go on the Pull Holds list immediately. The Pull Holds report is a list of holds requests for items owned by the local branch. The list contains only those items at that branch that are available on the shelves.
To Print the Pull Holds Report go to the *Circulation* menu and click on *Pull List for Hold Requests*.

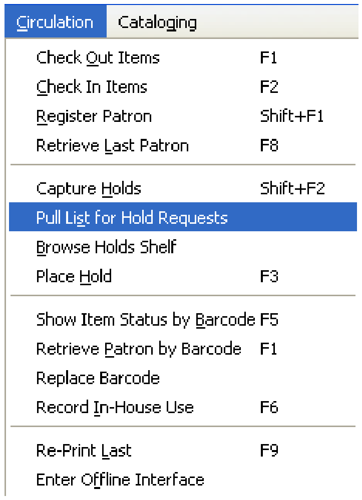
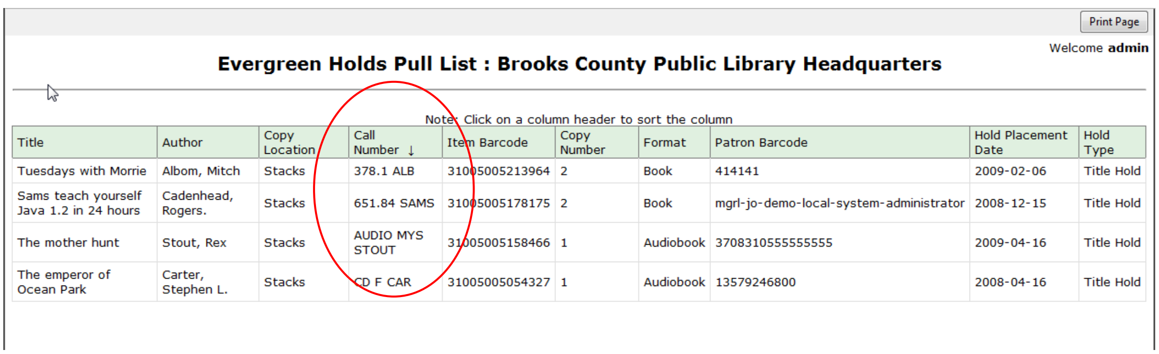


Figure 123 Circulation menu > Pull List for Hold Requests

The list appears on the screen.



Print Page

Welcome **admin**

Evergreen Holds Pull List : Brooks County Public Library Headquarters

Note: Click on a column header to sort the column

Title	Author	Copy Location	Call Number ↓	Item Barcode	Copy Number	Format	Patron Barcode	Hold Placement Date	Hold Type
Tuesdays with Morrie	Albom, Mitch	Stacks	378.1 ALB	31005005213964	2	Book	414141	2009-02-06	Title Hold
Sams teach yourself Java 1.2 in 24 hours	Cadenhead, Rogers.	Stacks	651.84 SAMS	31005005178175	2	Book	mgrl-jo-demo-local-system-administrator	2008-12-15	Title Hold
The mother hunt	Stout, Rex	Stacks	AUDIO MYS STOUT	31005005158466	1	Audiobook	3708310555555555	2009-04-16	Title Hold
The emperor of Ocean Park	Carter, Stephen L.	Stacks	CD F CAR	31005005054327	1	Audiobook	13579246800	2008-04-16	Title Hold

Figure 124 Pull Holds List

The list displays in columns the following data:
Title
Author (if available)
Copy Location
Call Number
Item Barcode
Copy Number (if available in item record)
Format
Customer Barcode
Hold Placement Date
Hold Type

These columns may be ordered either alphabetically or numerically by clicking on the heading for each column. To make it easier to find the items to be pulled, Staff should sort by the *Call Number* column (with the arrow pointing down). The list should contain only items that are on the shelf and available at that branch.
To print the list, click on the *Print Page* Command button. When the printer dialogue box appears, make sure the appropriate printer is selected (you don't want to print this on a receipt

printer), and click Properties (for the printer). Select Landscape under Orientation (in Layout). Click *OK* and *OK* again to print.

The staff person responsible for that day's report should date and initial the report before filing it.

Missing Hold Items

Usually all items on the list are found and pulled. However, sometimes the items are not on the shelf for whatever reason – missing, misshelved, etc. It is always best to try to pull the title with the matching item barcode. When a matching item for a hold is not found, but an alternative copy that matches the title/format is found—it can be used instead to satisfy the hold. Go back to the customer record and place the hold on the alternate item. The replacement item is now available for trapping. Also make sure you cancel the hold for the original item.

For items not found a staff person should indicate this by marking the item missing (Page 128), and a new target copy and location will be identified. The newly targeted item will appear on that library's pull list.

Also you can go to a customer's record, select the applicable hold, and choose ***Actions for Selected Holds > Find Another Target***. The customer remains at the top of the list but another library picks up the hold, as determined by Evergreen's holds matrix

Any hold request that is unfilled for 24 hours will go back into the system and be reshuffled – it may be that the request returns to the library's list but it may also be redirected elsewhere.

Trap Holds

Items pulled from the stacks are trapped using the Trap (or capture) commands, and the items, on the printed report, are checked off as found. If an item is already at the customer's Pick-up location, a Hold slip will print (see specific branch procedures for how this is handled). If the item is to be picked up at another branch, instructions are given to put the item in transit to the pickup branch of the current hold customer. The staff person is responsible for inserting a properly designated delivery flag in the item to indicate appropriate routing to the customer's pick up site.

Customers will be notified when the hold becomes available at the pickup location. Therefore, carefully refer to the screen directions while trapping holds. Because once an item is trapped, the customer notification is sent out for holds that are local. Trap holds that are transported to another branch will remain unavailable until the item is received. Needless to say, a customer should expect the item to be available at the designated pickup site once the hold pickup notice is received.

To trap (or capture) holds go to the circulation menu and click on *Capture Holds* in the drop-down list.

Figure 125 Circulation > Capture Holds

The *Check In/Process Item* window appears with a field (in green) where the barcode will be scanned in. All of the available ("pulled") items are captured by scanning in their barcode.

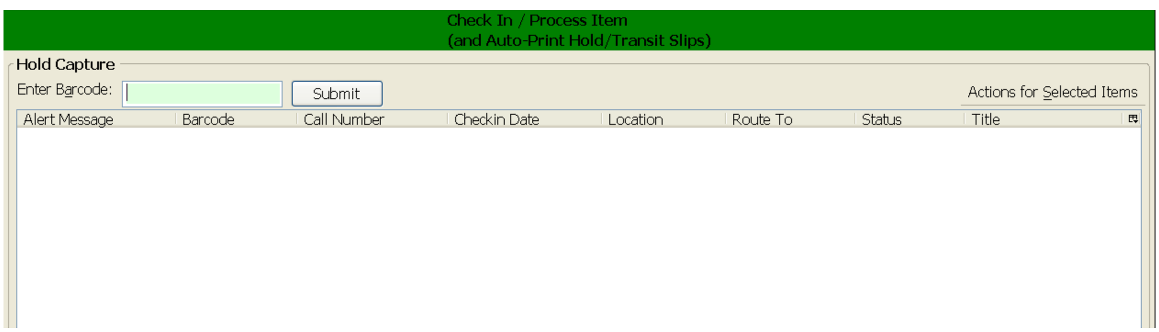
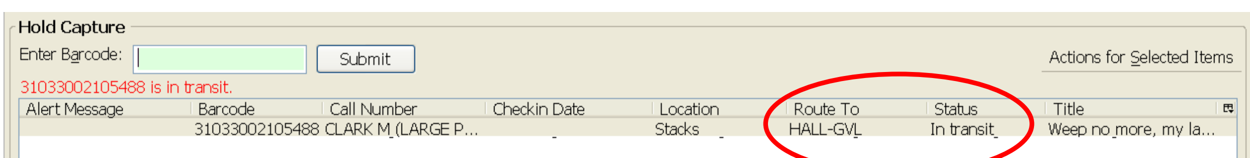


Figure 126 Trap Holds Window



When each hold is captured, a printout is generated--either a slip for that library's hold shelf or an in transit slip to ship to another branch to be placed on that library's hold shelf. Both types of slips may have all the following items.

- Barcode
- Title
- Name of customer who placed the hold
- Phone number of customer
- Email address for customer
- Request date
- Slip date

- Destination (for in transit slips only)
- Author (for local hold slips only)

The slips are printed as the item is captured and placed in the item. If no slip is generated, staff will need to check to see what the problem is – e.g., the wrong title was pulled or maybe the hold was for a different bib record and the item is not recognized.
The item status then automatically changes from “available” to “on holds shelf” if the pickup is local or “in transit” if it is to be sent to another branch. When the item goes to the local holds shelf, staff needs to check the slip to see if the customer is to be telephoned or sent an email message notifying them that the item is available for pickup.
As an alternative to *Capture Holds* you can use ***Circulation > Check in items*** (Figure 127) to capture holds. The advantage to using this window is that you can turn off automatic printing; however, you will have to select each time if you want to print or not.

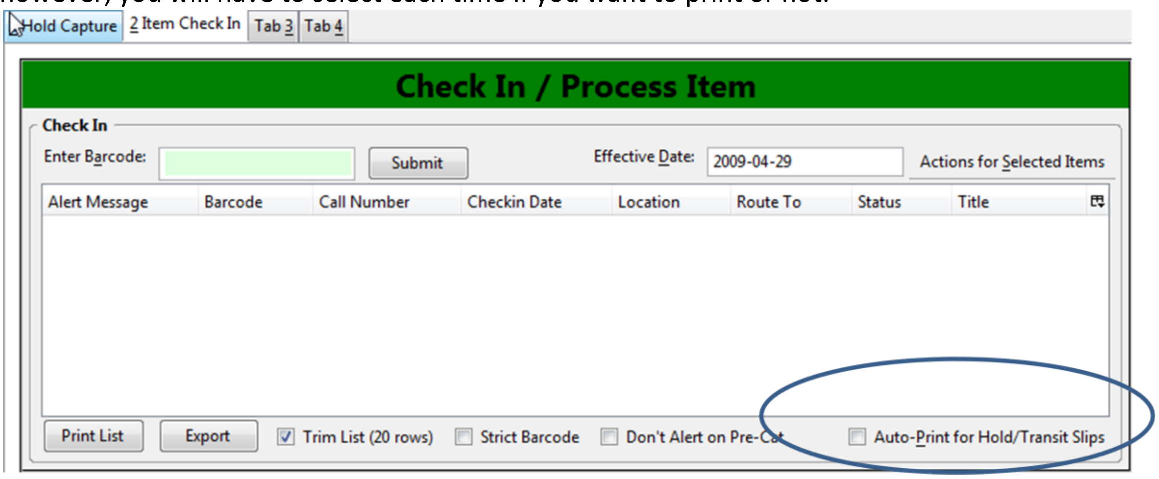


Figure 127 Using Check In window to Trap Holds

Receiving In Transit Items

When the item is received at another branch, use *Check in* from the circulation menu and scan in all item barcodes. This will change “in transit” holds items to “on holds shelf” status and will generate a hold shelf slip that is printed out and put in the item before placing on the holds shelf.
If the customer fails to pick up the hold within the library’s hold policy interval, the item is purged from the holds shelf and the hold is cancelled.

Browse Holds Shelf

Browsing the Holds Shelf is done by clicking on the *Circulation* menu and selecting *Browse Holds Shelf*.

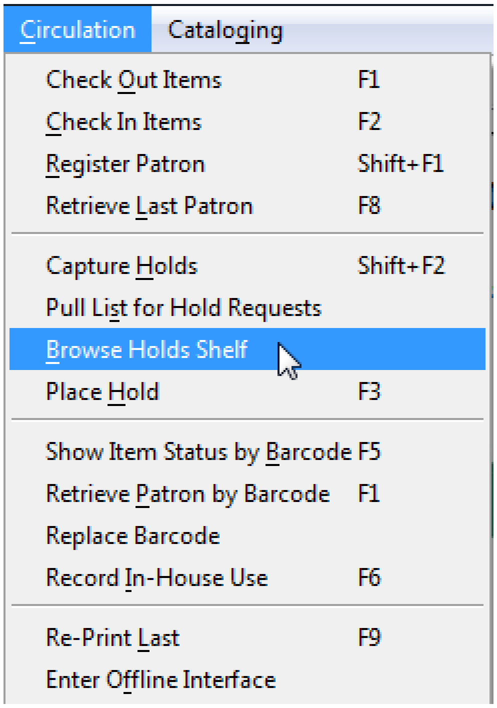
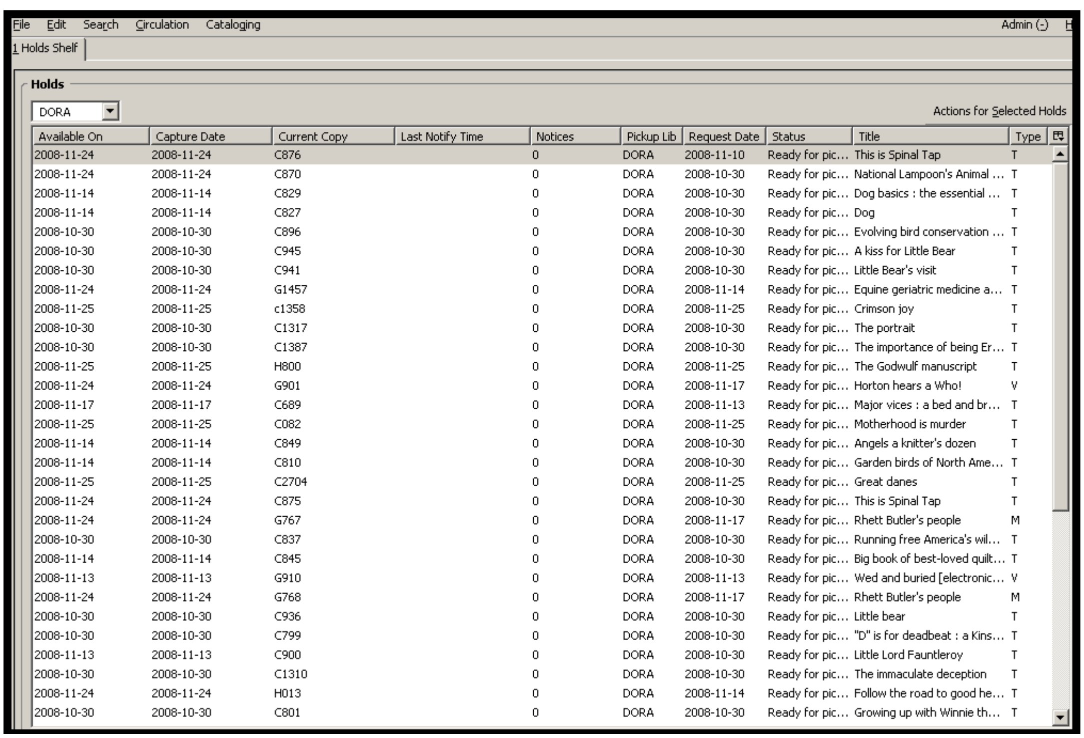


Figure 128 Access Browse the Holds Shelf

Browsing the holds shelf gives a list of all holds ready for pickup.
A screen listing all the holds appears with pertinent information in columns. Columns may be added or deleted by clicking on the *Column Manager* icon to the right of the various column labels. In this example all of the holds in the list are ready for pickup.



Available On	Capture Date	Current Copy	Last Notify Time	Notices	Pickup Lib	Request Date	Status	Title	Type
2008-11-24	2008-11-24	C876		0	DORA	2008-11-10	Ready for pic...	This is Spinal Tap	T
2008-11-24	2008-11-24	C870		0	DORA	2008-10-30	Ready for pic...	National Lampoon's Animal ...	T
2008-11-14	2008-11-14	C829		0	DORA	2008-10-30	Ready for pic...	Dog basics : the essential ...	T
2008-11-14	2008-11-14	C827		0	DORA	2008-10-30	Ready for pic...	Dog	T
2008-10-30	2008-10-30	C896		0	DORA	2008-10-30	Ready for pic...	Evolving bird conservation ...	T
2008-10-30	2008-10-30	C945		0	DORA	2008-10-30	Ready for pic...	A kiss for Little Bear	T
2008-10-30	2008-10-30	C941		0	DORA	2008-10-30	Ready for pic...	Little Bear's visit	T
2008-11-24	2008-11-24	G1457		0	DORA	2008-11-14	Ready for pic...	Equine geriatric medicine a...	T
2008-11-25	2008-11-25	c1358		0	DORA	2008-11-25	Ready for pic...	Crimson joy	T
2008-10-30	2008-10-30	C1317		0	DORA	2008-10-30	Ready for pic...	The portrait	T
2008-10-30	2008-10-30	C1387		0	DORA	2008-10-30	Ready for pic...	The importance of being Er...	T
2008-11-25	2008-11-25	H800		0	DORA	2008-11-25	Ready for pic...	The Godwulf manuscript	T
2008-11-24	2008-11-24	G901		0	DORA	2008-11-17	Ready for pic...	Horton hears a Who!	V
2008-11-17	2008-11-17	C689		0	DORA	2008-11-13	Ready for pic...	Major vices : a bed and br...	T
2008-11-25	2008-11-25	C082		0	DORA	2008-11-25	Ready for pic...	Motherhood is murder	T
2008-11-14	2008-11-14	C849		0	DORA	2008-10-30	Ready for pic...	Angels a knitter's dozen	T
2008-11-14	2008-11-14	C810		0	DORA	2008-10-30	Ready for pic...	Garden birds of North Ame...	T
2008-11-25	2008-11-25	C2704		0	DORA	2008-11-25	Ready for pic...	Great danes	T
2008-11-24	2008-11-24	C875		0	DORA	2008-10-30	Ready for pic...	This is Spinal Tap	T
2008-11-24	2008-11-24	G767		0	DORA	2008-11-17	Ready for pic...	Rhett Butler's people	M
2008-10-30	2008-10-30	C837		0	DORA	2008-10-30	Ready for pic...	Running free America's wil...	T
2008-11-14	2008-11-14	C845		0	DORA	2008-10-30	Ready for pic...	Big book of best-loved quilt...	T
2008-11-13	2008-11-13	G910		0	DORA	2008-11-13	Ready for pic...	Wed and buried [electronic...	V
2008-11-24	2008-11-24	G768		0	DORA	2008-11-17	Ready for pic...	Rhett Butler's people	M
2008-10-30	2008-10-30	C936		0	DORA	2008-10-30	Ready for pic...	Little bear	T
2008-10-30	2008-10-30	C799		0	DORA	2008-10-30	Ready for pic...	"D" is for deadbeat : a Kins...	T
2008-11-13	2008-11-13	C900		0	DORA	2008-10-30	Ready for pic...	Little Lord Fauntleroy	T
2008-10-30	2008-10-30	C1310		0	DORA	2008-10-30	Ready for pic...	The immaculate deception	T
2008-11-24	2008-11-24	H013		0	DORA	2008-11-14	Ready for pic...	Follow the road to good he...	T
2008-10-30	2008-10-30	C801		0	DORA	2008-10-30	Ready for pic...	Growing up with Winnie th...	T

Figure 129 Example Holds Shelf List

The Hold Shelf report can be sorted by whatever column is visible by clicking on the heading. You can also select a different branch then the default (branch where the workstation is registered.
The print command can be used to print the titles on the hold shelf list.
The *Actions for Selected Holds* menu (Figure 130) can be used to perform any of the listed actions on an individual hold shelf item.

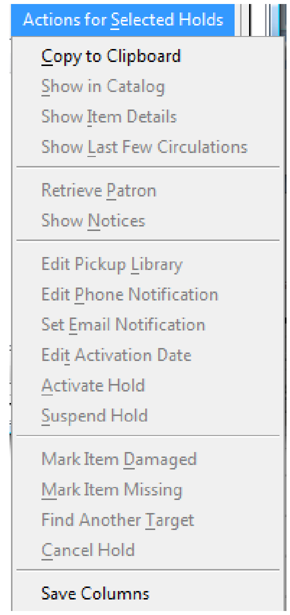


Figure 130 Holds Shelf Actions for Selected Holds

Expired Holds

Use the *Browse Hold Shelf* report to manage the Holds shelf efficiently. The report can be sorted by capture date. This sorting will give an accurate record for pulling expired holds (holds whose date has exceeded the library's hold policy). Available holds that have been on the Holds shelf for at least seven days will be identified by the capture date and those exceeding the date need to be removed from the hold shelf and put back in the collection or routed to the next customer hold.

- For items found on the hold shelf, remove the hold by selecting the item from the *Browse Holds Shelf* list. Click on Actions for Selected Holds and click on *Remove Hold*. Evergreen will indicate the route path the item requires.
- If the item is not found on the Holds shelf, then it could be that the item is in stacks or missing. Check the stacks for those items not on the hold shelf to determine if they are misplaced. When found clear the last hold and check status of the item to determine where it should be shelved or forwarded for the next customer hold. If they are not found then they need to be marked as missing (page 128).

As a courtesy to our customers, items that are removed from holds should be noted in the customer's record as a customer visible note. In the note field enter the message *Unclaimed Hold, "Title", "Date"*. Where Title and Date are replaced with the *item title* and the date the item was pulled (yyyy-mm-dd). Staff should also notify the customer, the next time the customer's card is scanned, that their last hold was not picked-up, and then remove the note from the customer's record.

Chapter 6 Item Information and Maintenance

Overview

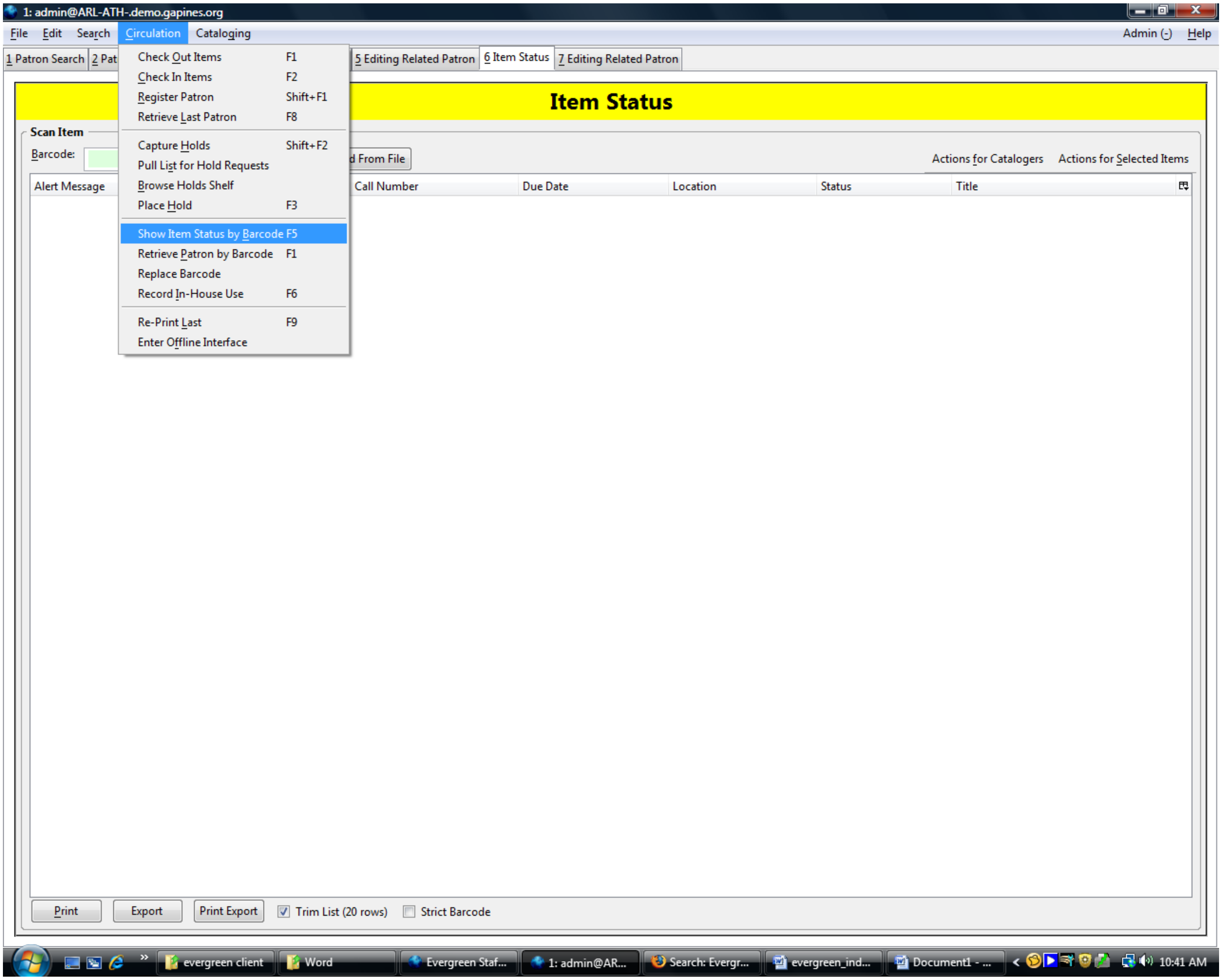
Each item in our bibliographic database has a unique identifier, called the item ID. The item ID is the barcode number located on the item. The item ID is used in addition to the shelving number (call number) and copy number.
Each item must also be assigned an item type. The item type assigned to each item determines certain characteristics, such as how the item circulates to different users. The item type also identifies the item as a member of a specific material type (e.g., BOOK, CD, and VIDEORECORDING).
In addition, each item must have a home location and a current location. The home location is the item's permanent location—where the item is supposed to be when not circulating (e.g., ADBOOKCLUB, AUDIO, and LARGEPRINT). The current location shows where the item is as the result of circulation activity. Evergreen updates the current location when items are checked out, checked in, put on hold, put in transit, or sent to repair.
For each item, Evergreen tracks the date last charged, the date the item was created, the ID of the user who last charged out the item, the total number of charges, and the total in-house. Additionally, Evergreen also keeps track of the item's hold requests, unpaid bills, return claims, and material booking requests.

Mark Item Missing

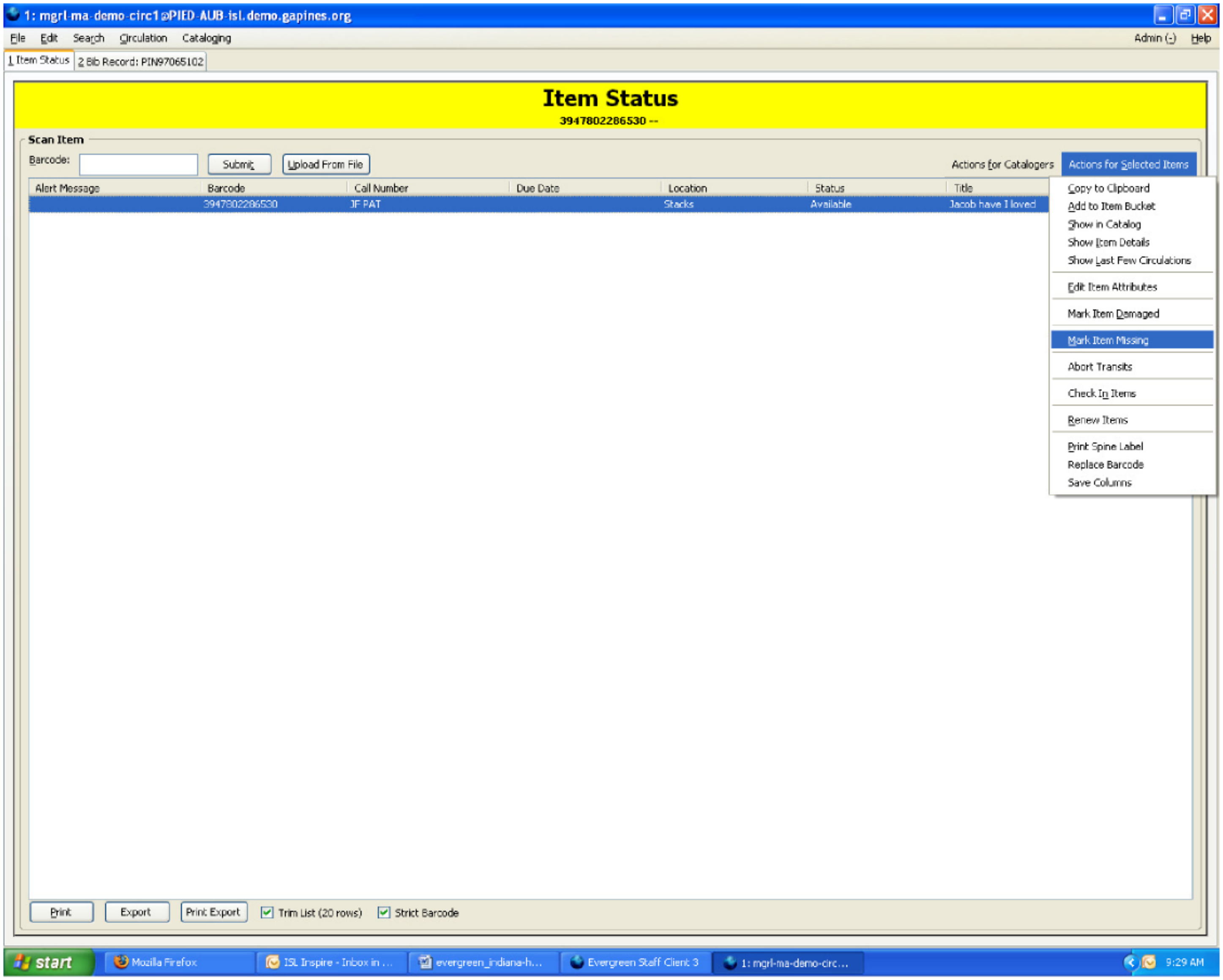
Mark an item missing when you cannot physically locate an item which the Catalog record indicates should be in its home location. This frequently occurs when you attempt to locate an item in stacks and it is not found. Also follow this procedure after looking for a customer hold item for up to three days in a row. After the third try, mark the item missing.
When this feature is used it changes the Current Location to MISSING. This alerts the staff so time is not spent looking for the missing item.

To mark an item missing

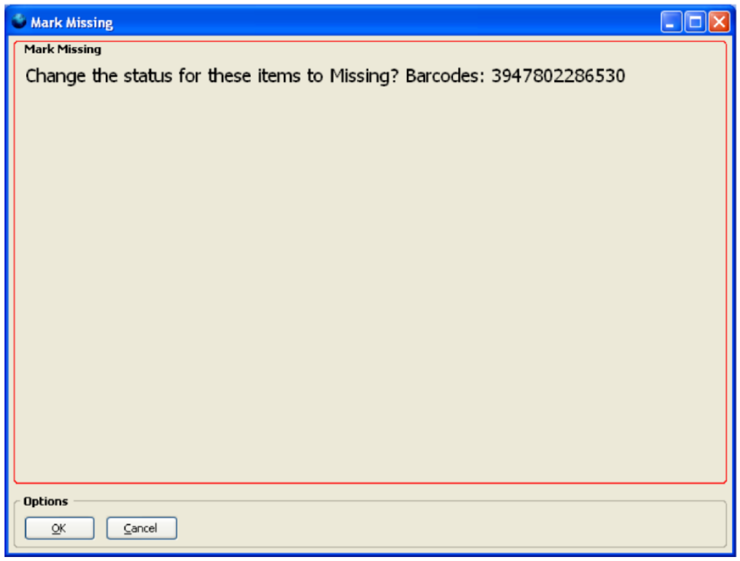
To mark an item missing, start by retrieving the item in the staff client. This can be done from the ***Circulation* menu > *Show Item Status by Barcode***.



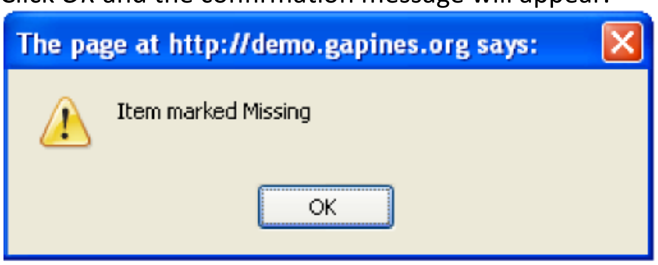
From the *Item Status* window, enter the barcode for the missing item.
After submitting the barcode, the item will appear below. Select the item and click on *Actions for Selected Items* and *Mark Item Missing*.


1: mgrl-ma-demo-circ1@PIED-AUB-isl.demo.gapines.org
File Edit Search Circulation Cataloging
Admin (-) Help
1 Item Status
2 Bib Record: PIN97065102
Item Status
3947802286530 --
Scan Item
Barcode:
Submit
Upload From File
Actions for Catalogers
Actions for Selected Items
Alert Message
Barcode
Call Number
Due Date
Location
Status
Title
3947802286530
JF PAT
Stacks
Available
Jacob have I loved
Copy to Clipboard
Add to Item Bucket
Show in Catalog
Show Item Details
Show Last Few Circulations
Edit Item Attributes
Mark Item Damaged
Mark Item Missing
Abort Transits
Check In Items
Renew Items
Print Spine Label
Replace Barcode
Save Columns
Print
Export
Print Export
Trim List (20 rows)
Strict Barcode
start
Mozilla Firefox
ISL Inspire - Inbox in ...
evergreen_indiana-h...
Evergreen Staff Client 3
1: mgrl-ma-demo-circ...
9:29 AM

The Mark Missing message will appear in a dialog box.



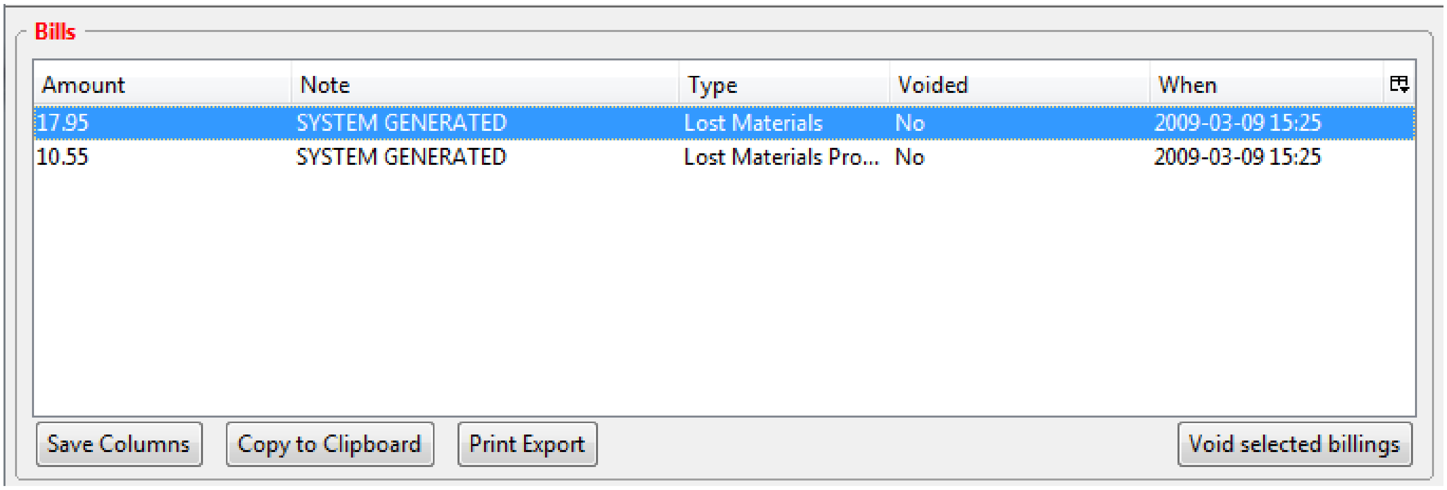
Click *OK* and the confirmation message will appear.



Mark Items Lost and Claims Returned

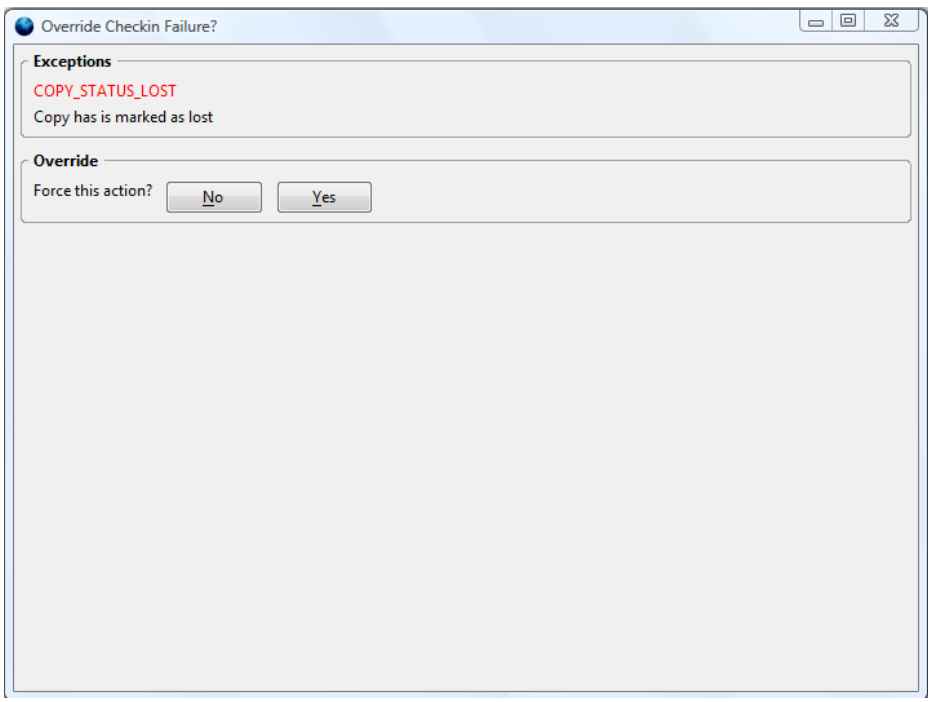
Use Mark Item Lost if a customer claims he has lost the item. This feature changes an item's current location to LOST-CLAIM without discharging it from the customer's account. Marking an item lost will automatically bill the customer the replacement cost of the item as determined by record, and a processing fee as determined by the library local policy. If the replacement cost field is blank, a default replacement cost as determined by the library is used. If the cost is 0.00, you can manually add the replacement portion to the bill. This feature will automatically bill the customer for the material and processing fee. It is good practice to check the customer's record and ensure that the bill is applied, and if not, to apply it immediately.

> Note: The price of lost items from another SC Lends library will be collected and transferred back to the home library. However, if lost item fees cannot be collected, it will be considered a cost of doing business, and no library will be charged for not being able to collect on an item.

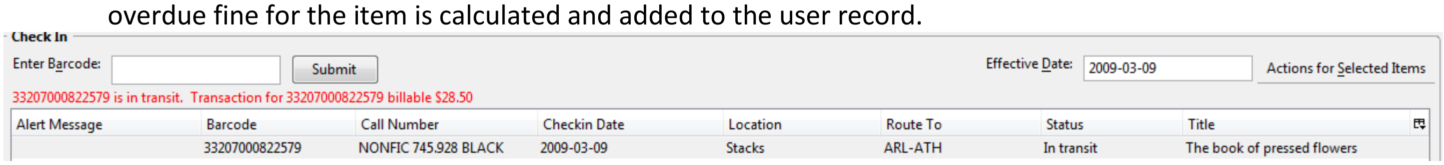


What happens if an item is returned before the user pays the Lost Item bill?

If the item is returned or found before the user pays the lost item bill, Evergreen displays a message when you check-in the item, check it out to another user, renew the item, or put the item in transit.



Evergreen clears the item's LOST-CLAIM or LOSTASSUM location, and removes the lost item bill from the user record. If you assessed a lost item processing fee at the time the item was marked Lost, Evergreen automatically removes the bill from the user's Bill record as well. The overdue fine for the item is calculated and added to the user record.



What happens if an item is returned after the user pays the Lost Item bill?

If the item is returned or found after the user pays the lost item bill, Evergreen alerts you that it cleared the LOST-CLAIM or LOST-ASSUM location. When you see this message, you know that the item had been marked as Lost, and the lost item bill was paid or waived. You can issue a refund to the user for the paid lost item bill - less the reprocessing fee - as long as the customer can produce a copy of the original Library bill receipt dated within one year of the return.

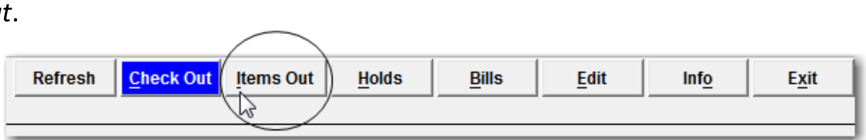
What is the difference between Claims Lost and Assumed Lost?

Claims Lost means that a staff member manually marked an item as Lost. Assumed Lost means that the Assumed Lost report automatically marked an item as Lost 30 days after the due date. Items in this category do not display as current checkouts but are inactive checkouts, as they had been changed to LOST-ASSUM status. LOST-ASSUM, automatically bills customers for items they have not returned after 1 month.
Items that are overdue for a specified period can also be marked LOST-ASSUM. This functions in a similar way to LOST-CLAIM, but does not require that each item be marked manually.

To mark an item lost

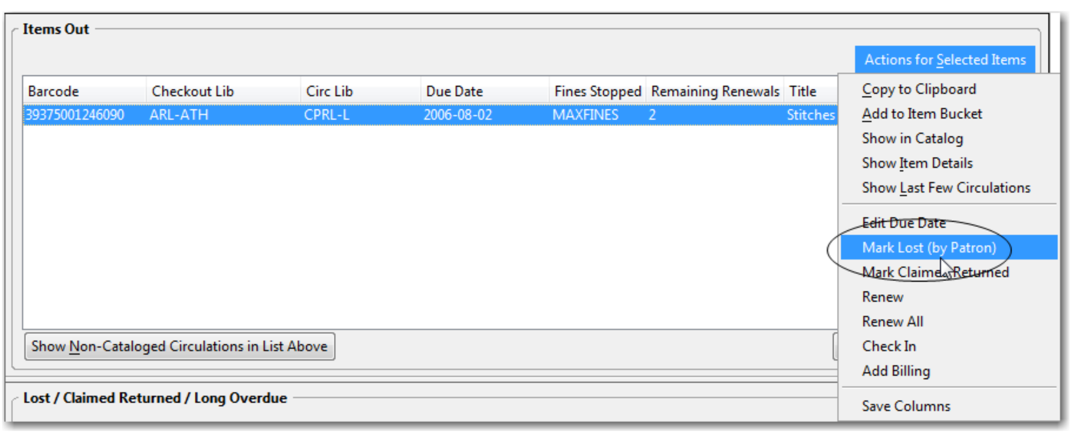
To mark items as *Lost* or *Claimed Returned*, retrieve customer record.

Click *Items Out*.



Select appropriate item.

Click on *Actions for Selected Items* and choose relevant action from drop down menu.



Click *Refresh* to update record immediately. The lost item now displays in the *Lost/Claimed Returned/Long Overdue* field.

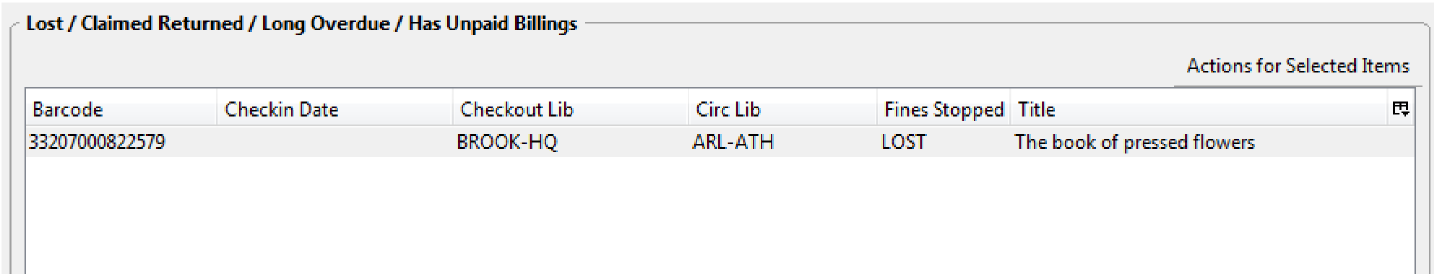


Figure 131 Lost, Claims Returned, Long Overdue Pane

Claims Returned

Occasionally a customer will believe that an item has been returned or that they never borrowed the item. Definitions:

Claims Returned is an item status indicating that a customer borrowed the material but believes they have already returned the item to the library. This is discovered when the customer realizes that Evergreen is showing that the item has not been returned.

Claims Never Had is when a customer does not believe they ever borrowed the Item. This is most frequently discovered when the customer realizes that Evergreen is showing a checked out item that was not borrowed by the customer.

When a customer reports that they have returned an item that Evergreen shows has not been returned; the Library staff will go with the customer to the shelves to see if the item is on the shelf by checking for a matching item ID.

Item is on the shelf - The most common resolution is that the item is found. Staff will discharge the item on the date due so no fines will be charged.

Possible reasons for this condition include the item was not properly discharged but instead was simply shelved, or the customer returned the item to the shelf themselves.

Item not on the shelf - If the item is not found on the shelf, encourage the customer to perform one more checks: at home, under the car seat, under the bed, etc. just to double check. Encourage the customer to call the staff person they talked to in order to report their results. This will allow the same staff some level of continuity with the customer in resolving their missing material.

Customer had the Item - If the item is found by the customer, they are liable for the fines due. The system stops accruing overdue fines on an item once the $10.00 maximum is reached.

Customer did not have the Item – Enter a Claims return- If the item is not found by the customer and not found by the library, a Claims Returned for the item should be entered into Evergreen using the *Claims Return* feature. Evergreen will automatically increment the Claims Returned counter in the customer's record. The next time (and every time thereafter) you scan the customer's card Evergreen will display an information-only message indicating a Claims Return for this customer.

Claims Returned status on items means that no overdue fines will accrue and the customer will not be charged for replacement of the item.

The date entered for a *Claimed Returned* sets the fine. If the date given for the *Claimed Return* is past, you need to manually adjust the bill.

Marking an item as *Claimed Returned* does not eliminate the accrued fines. To mark an item *Claimed Returned*, retrieve customer record; select ***Items Out > Actions for***

Selected Items, and choose *Mark Claimed Returned* from drop down menu (Figure 132).

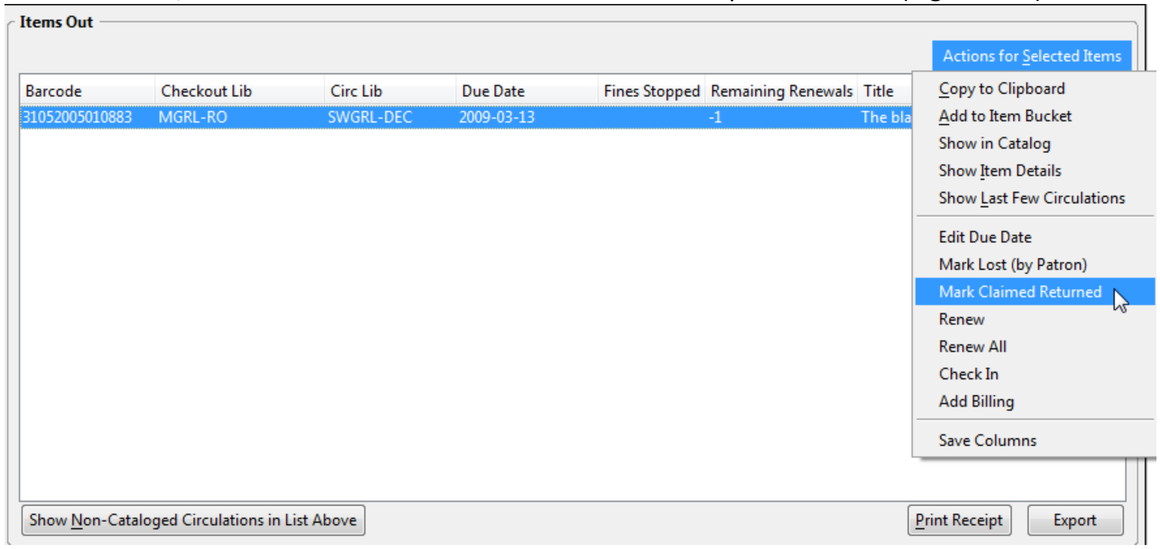
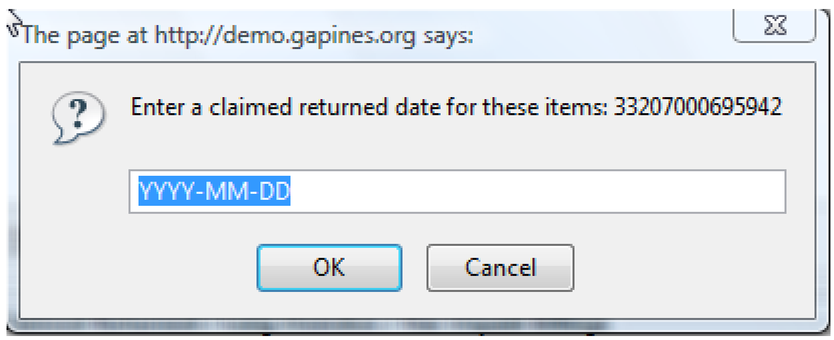
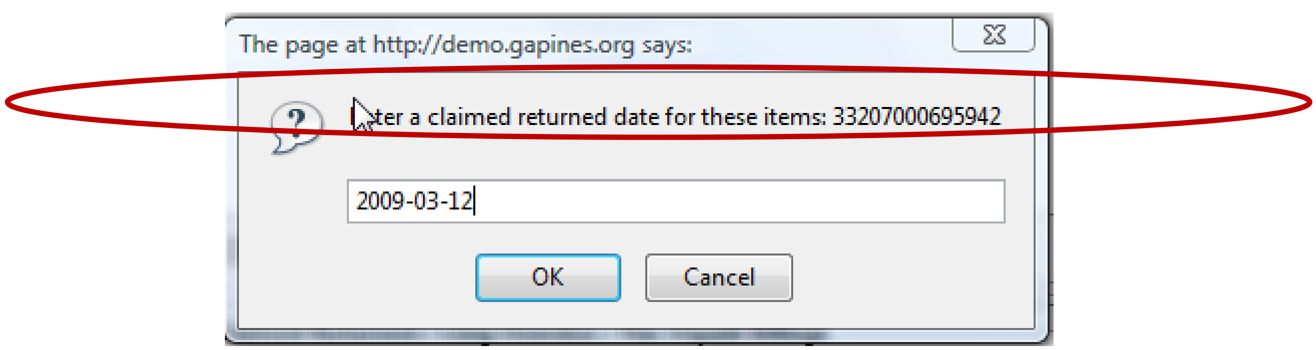


Figure 132 Mark Item Claims Return



Enter return date and click *OK*.



The lost item now displays in the *Lost/Claimed Returned/Long Overdue* Pane (Figure 131).

Delete Title, Call Numbers, or Items

This Evergreen lets you completely remove a title, call numbers, or items from the system. When deleting item records, it is extremely important to use caution. Be sure to double check the item number before deletion to avoid having to redo your work.

Begin by conducting a Catalog search for the item using either search by Barcode (if available) or search by title.
Using a search by title result as an example (displayed in Figure 134) Click on the desired title.

Figure 134 Catalog Search Result

This example selected the title "George Wallace American populist" Evergreen displays the *Record Summary* window (Figure 135). when working with a bibliographic record, you will see a brief record summary at the top of the screen, regardless of the view you are using. It lists the title and author of the book. If there is no 1xx line on the MARC record, the first 7xx line will be displayed as the author. The Title Control Number (TCN), edition statement, if any, and publication date are also displayed. The record summary indicates who created the record, who last edited it, and the date of the last edit. The branches where the creators and editors work will be listed in parentheses, and then their user name or barcode, if they have no user name.

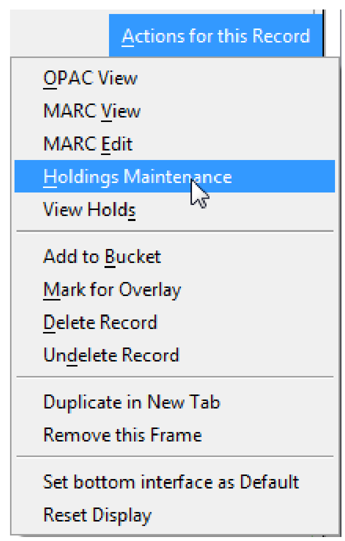


Figure 133 Actions for this Record Drop Down List

After searching for a title, you can view holdings for specific libraries by clicking on *Actions for this Record* in the upper right on the OPAC view of the record. A drop-down menu will appear (Figure 133). From the list, select *Holdings Maintenance*. The *Holdings Maintenance* window will appear. This is the view that is used when working with local holdings, so you are likely to frequently use this view. This screen displays the holdings information for your library and allows you to add, delete and edit holdings as needed.

Below the *Record Summary*, is the *Holdings Maintenance* pane. Note the various levels of information displayed. The *Holdings Maintenance* window shows a hierarchy of holdings. The first level is the Consortium (SL Lends) union catalog. Beneath it is the library system, which will have one or more libraries attached (Figure 136). Then the Volume/Call Number line or lines

display, and finally the item line(s). In order to display all the lines, you may have to click the small boxes with plus
signs next to the various lines to display hidden information. If you click the box and nothing displays, there are no holdings on this record at your library. To prevent having to open the boxes each time you view the *Holdings Maintenance* window, make sure you have green check marks in the boxes next to *Show Volumes* and *Show Items*, circled in Figure 136. These will remain checked or unchecked until you change them.

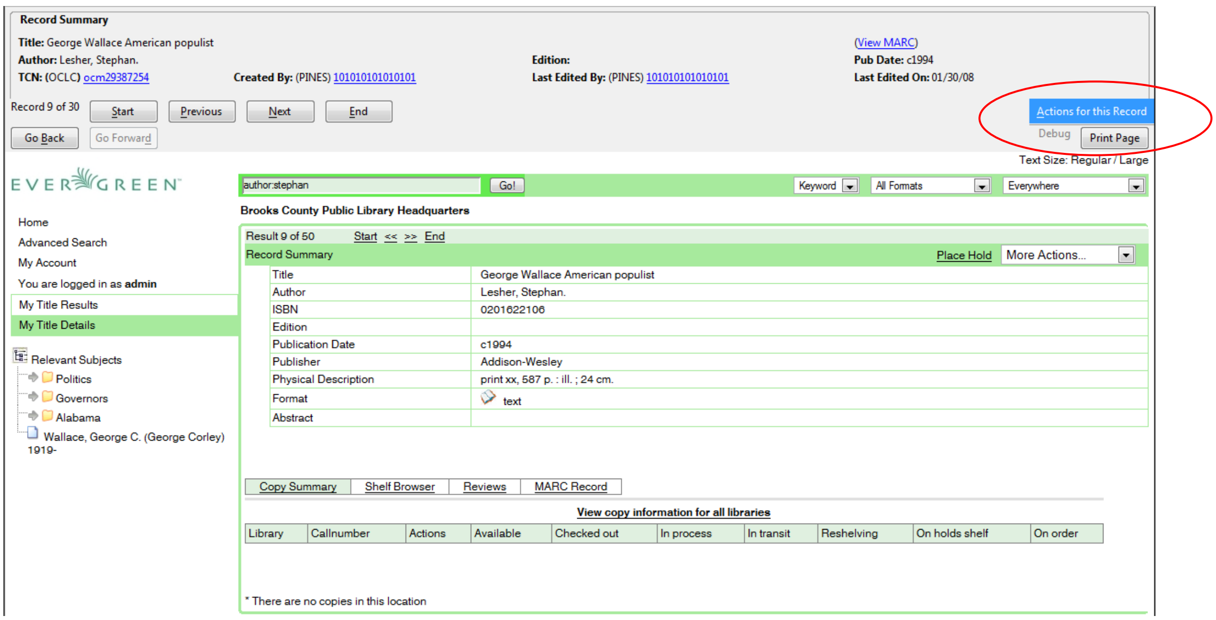


Figure 135 Records Summary

Beneath each library is the listing of all of the copies of the title owned by the library. Horizontally the item number is listed first, followed by the call number, the name of the circulating library, the due date if the copy is checked out, the location where the copy is stored, the owning library and the status.

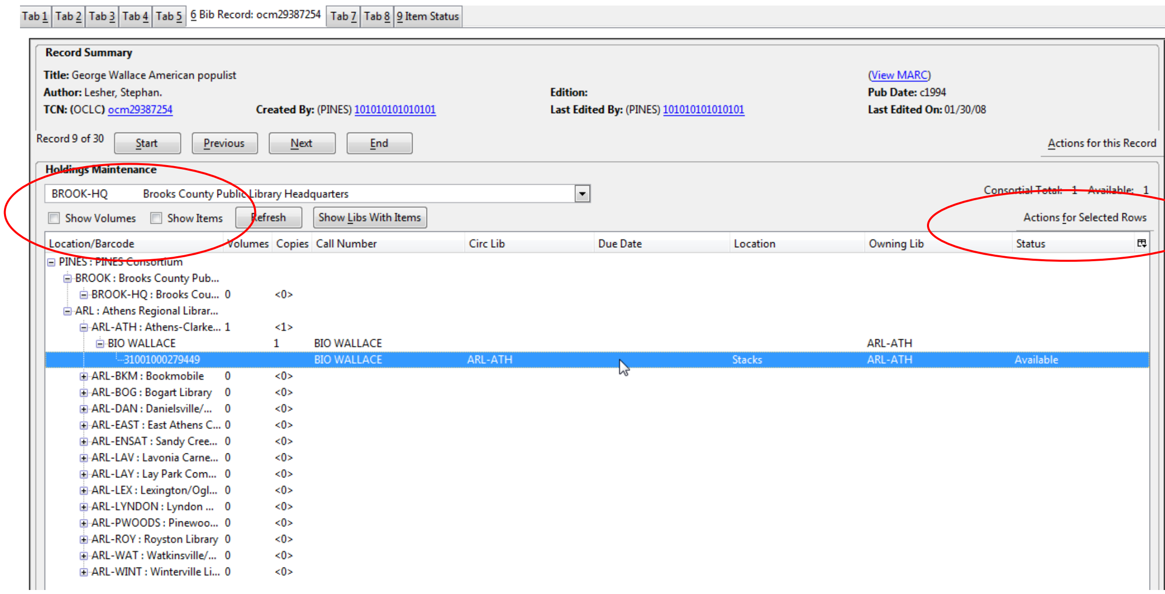


Figure 136 Holdings Maintenance Window

Note--Another way to view the holdings of other libraries is to click the *Show Libs with Items* (Alt + L) button, circled below. All of the libraries with holdings on this record will show in the display screen below your library. To change the screen back to displaying your holdings only, simply click the *Refresh* button, next to the *Show Libs with Items* button.

To set the *Holdings Maintenance* screen as your default view, go to *Actions for this Record* and choose *Set bottom interface as default* (Figure 137). The next time you click on a record title it will take you directly to this screen instead of the OPAC view. You can also change your view to MARC view, MARC edit, or back to OPAC view as needed, and you can reset your default view any time.

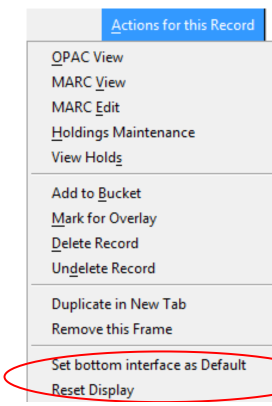


Figure 137 Setting the default view

While at the *holdings maintenance* window of the record from which you want to delete an item, click on the appropriate item row to highlight it. Click on *Actions for Selected Rows* and select Delete Items (Figure 138).

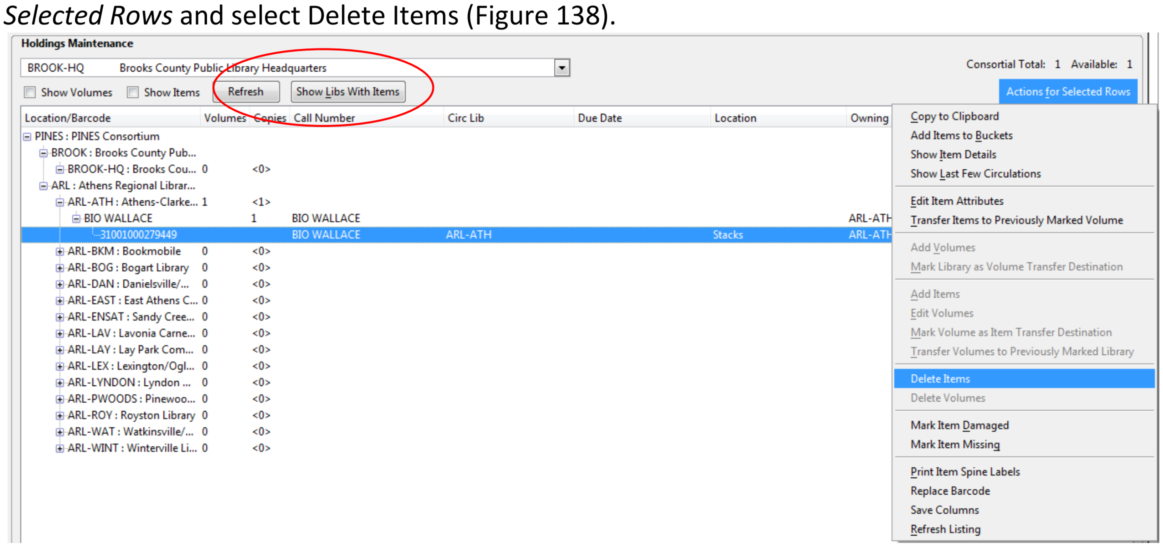
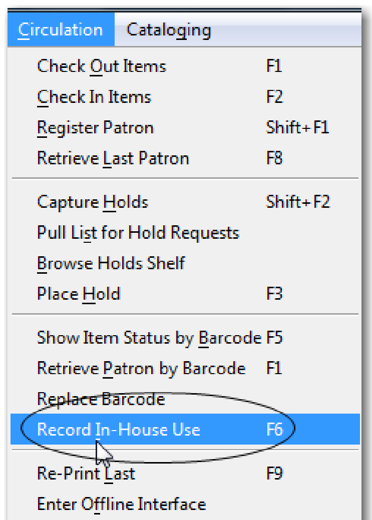


Figure 138 Delete Items Action

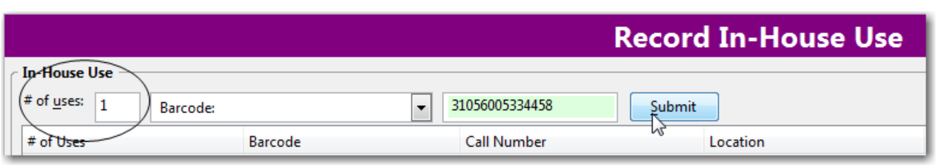
You will get a prompt asking "Are you sure you would like to delete this one item? Click on *Delete*. You will get a message saying "Action complete". Click on *OK*. You will be returned to the holdings screen. The volume and item should be gone.
Multiple items can be deleted by highlighting the first item, holding down the control key, and highlighting the other items to be deleted. Click on *Actions for Selected Rows*, and then click on *Delete Items*. A prompt appears asking if you want to delete the three items. Click on *Delete*. Click on *OK*.

Mark Items Used

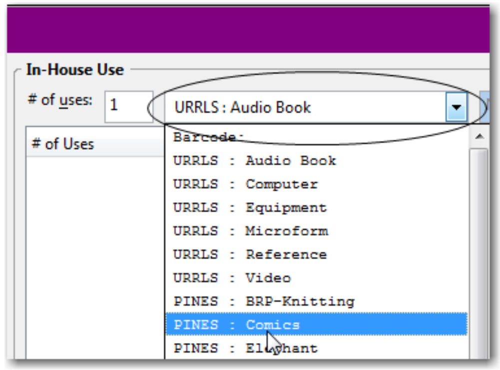
The Mark Item Used feature lets you track usage for items that were used in the library but not checked out by a customer.
To record in-house use, select ***Circulation > Record-In House Use*** or press **F6**.



Enter number of uses, scan barcode and click *Submit*.

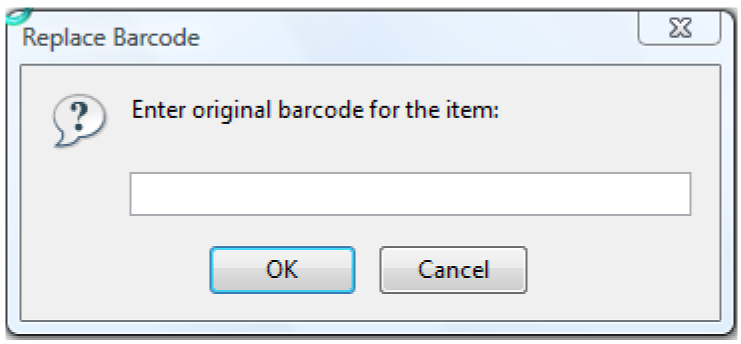


To record *In-House Use* of non-catalogued items choose appropriate item from the drop down menu in *Barcode* field and click *Submit.*

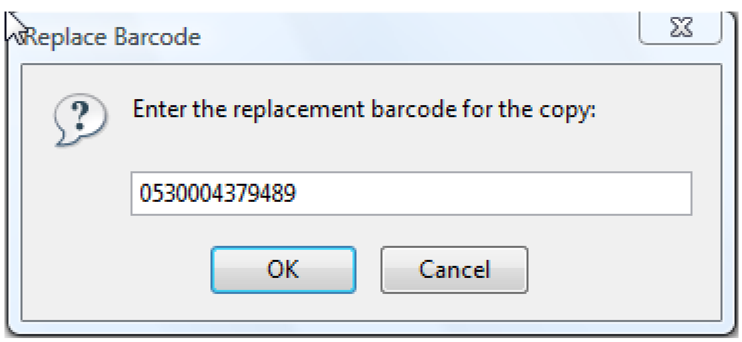


Change Item Barcode

To replace an item barcode click on ***circulation > replace barcode***.
A dialog box appears.



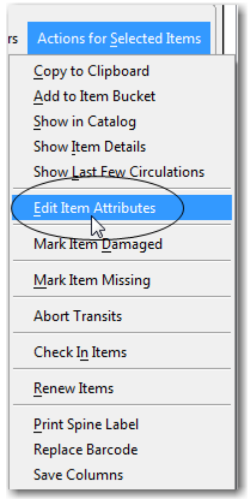
Scan or key in the original barcode and click on *OK.*
Another dialog box replaces the first. This is where you will enter the new barcode and click on *OK.*



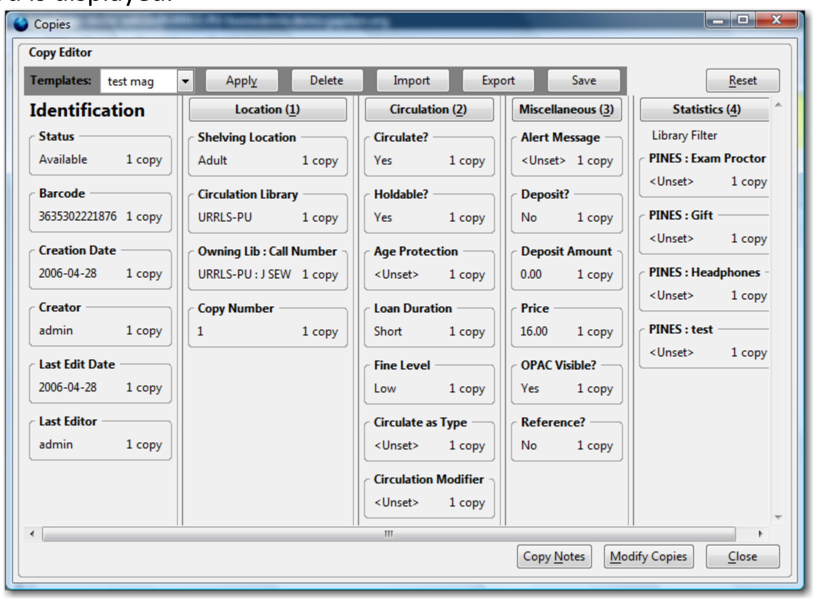
The dialog box closes but there is no confirmation message. The only time you receive a message, at this point, is in the event Evergreen is unable to replace the barcode.

Editing item attributes

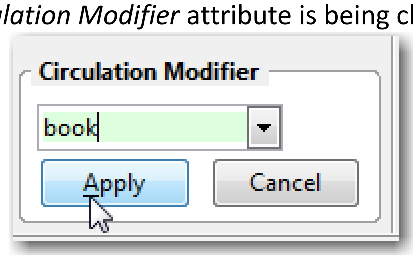
To edit an item record retrieve record by scanning under *Search for copies by Barcode*, as described above, or by viewing item within a customer's record.
Once item is displayed, highlight it and select ***Actions for Selected Items >Edit Item Attributes***.



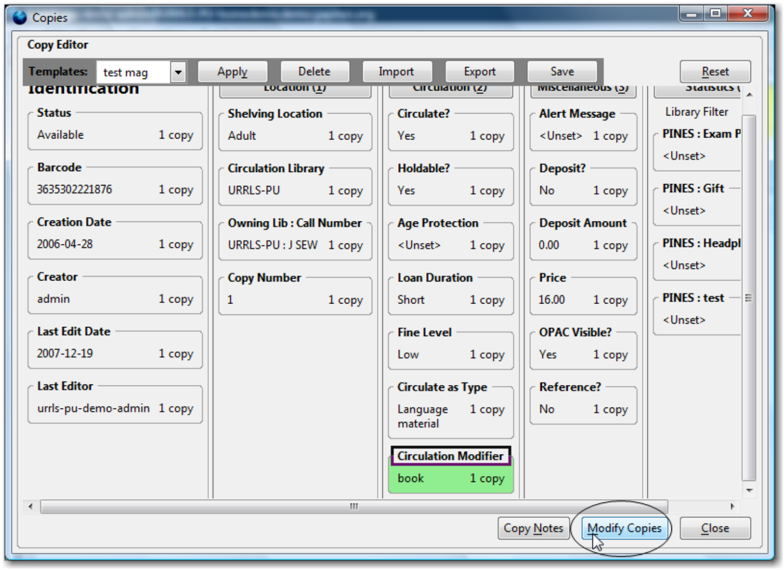
The item record is displayed.



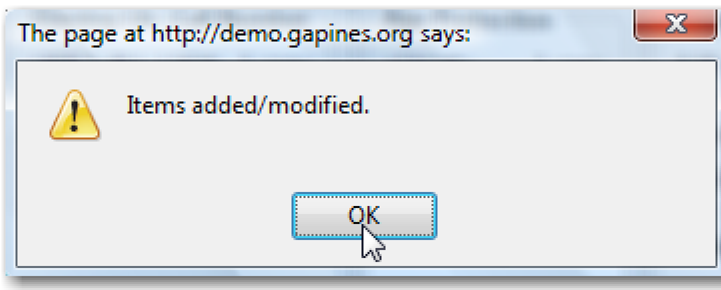
Make any required changes and click *Apply* within individual attribute fields as you edit each field. In this example, the *Circulation Modifier* attribute is being changed.



Once all editing is complete, click *Modify Copies.*



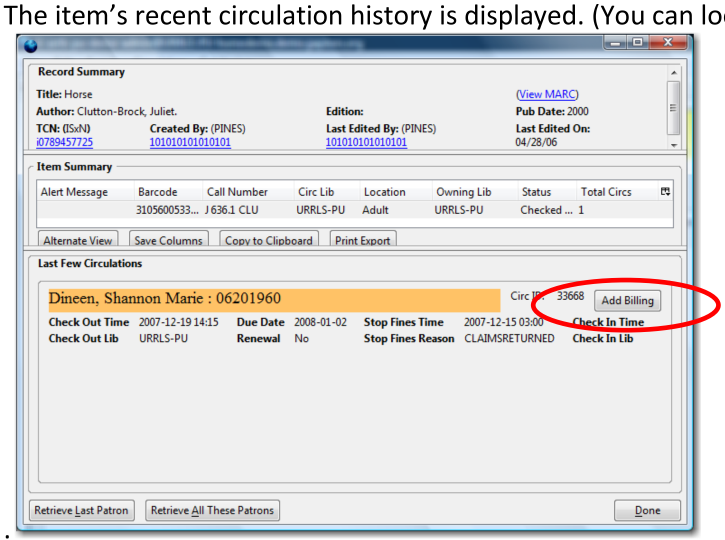
Click *OK*.



Viewing past circulations

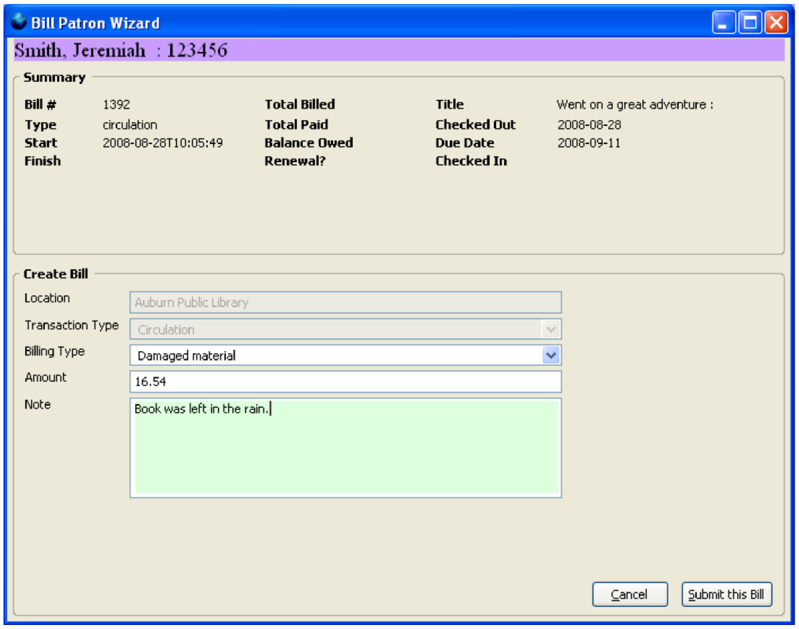
To view past circulations, either go to *Item Status* as described above, or select item from within a customer record, and select ***Actions for Selected Items > Show Last Few Circulations***.

The item's recent circulation history is displayed. (You can look up the last borrower.)



.

If the item was returned damaged, lost, etc., staff can retrieve the last customer to circulate the item and add a bill by clicking on the *Add Billing* command.


Bill Patron Wizard
Smith, Jeremiah : 123456
Summary
Bill # 1392
Type circulation
Start 2008-08-28T10:05:49
Finish
Total Billed
Total Paid
Balance Owed
Renewal?
Title Went on a great adventure :
Checked Out 2008-08-28
Due Date 2008-09-11
Checked In
Create Bill
Location Auburn Public Library
Transaction Type Circulation
Billing Type Damaged material
Amount 16.54
Note Book was left in the rain.
Cancel
Submit this Bill

Chapter 7 Special Circulation Functions

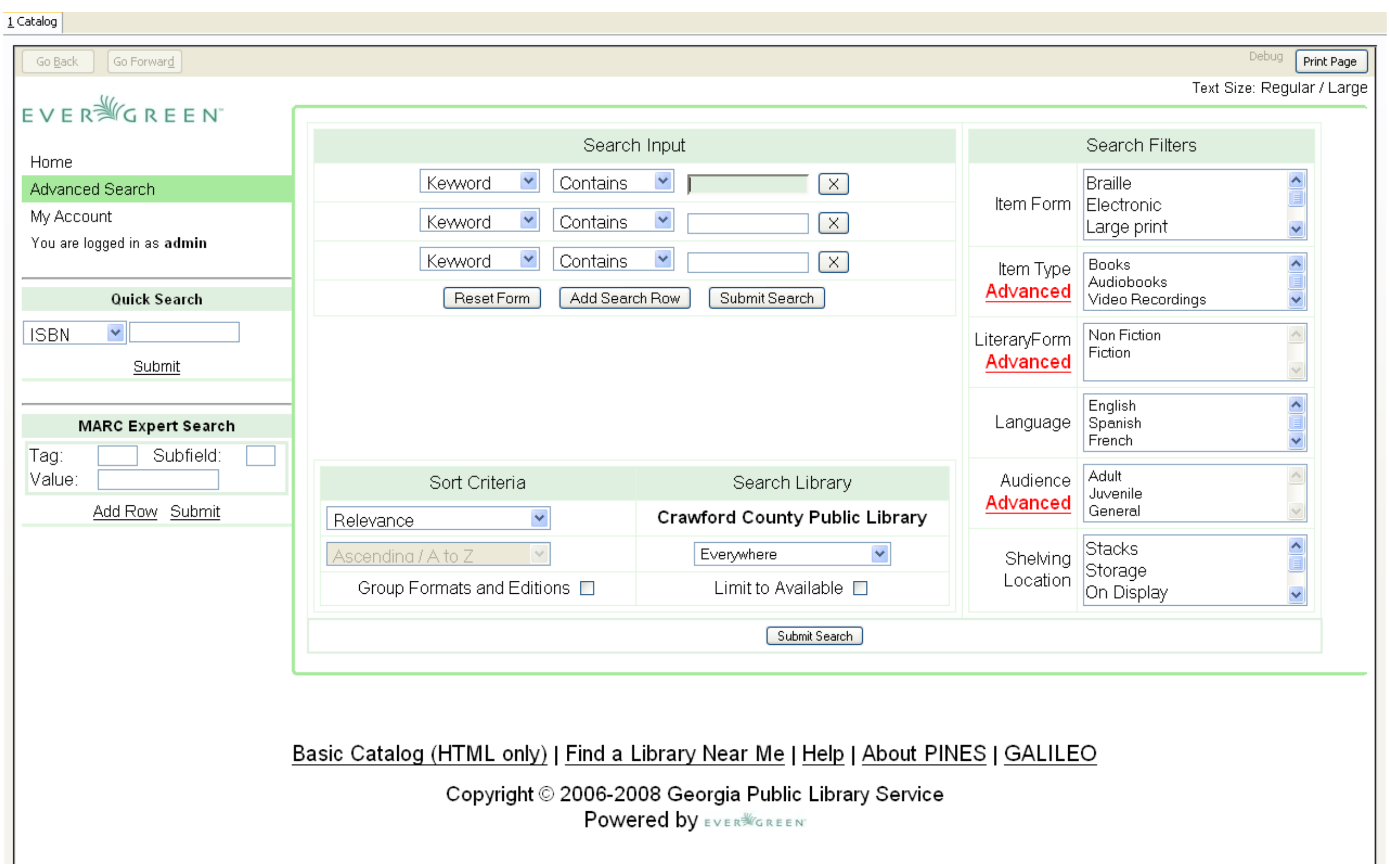
Overview

In this section, we will cover the following topics:

- Catalog Searches
- Check in serials (future feature)
- Circulation Reports
- Check-out impermanent materials such as forms, paperback novels, etc.

Catalog Searches

Search the catalog by selecting **Search > the Catalog** in the Evergreen menu or pressing F3 on the keyboard. The search page opens in the current tab. This is the default search page, which is the same as the Advanced Search page viewable to customers using the OPAC. In the left frame below the logo, the Advanced Search page displays the user name of the person now logged into the Staff Client. In the sample page the user is **admin**.

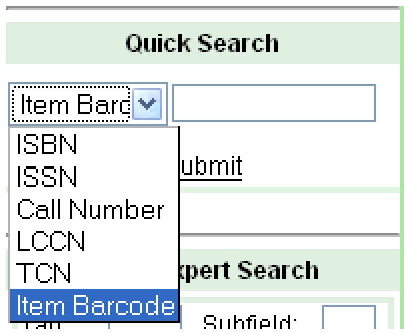


Alternate Searches

On the left, there are other options for searching: *Home*, **Quick Search** and **MARC Expert Search**. Searches with Quick Search and MARC Expert Search are independent of the searches included in the main search fields (Search Input and Search Filters) and vice versa.

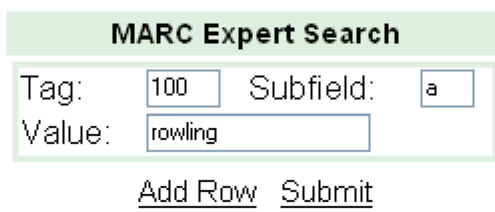
Quick Search

Quick Search allows you to search by ISBN, ISSN, Call number, LCCN, TCN (system control number), or Item Barcode. Simply select the type from the drop-down menu, enter the full or partial number, and select **Submit** to perform the search.



MARC Expert Search

MARC Expert Search allows you to search using MARC field tag number and subfield value (alphabetic or numeric), and the information/value contained in the subfield (e.g., Rowling for field 100, subfield a) (subfield is optional) and clicking on the *Submit* button. You may also search by additional fields (combined with *and)* by selecting **Add Row**.



It is also possible to do a combined Quick Search and a MARC Expert Search.

Home Search

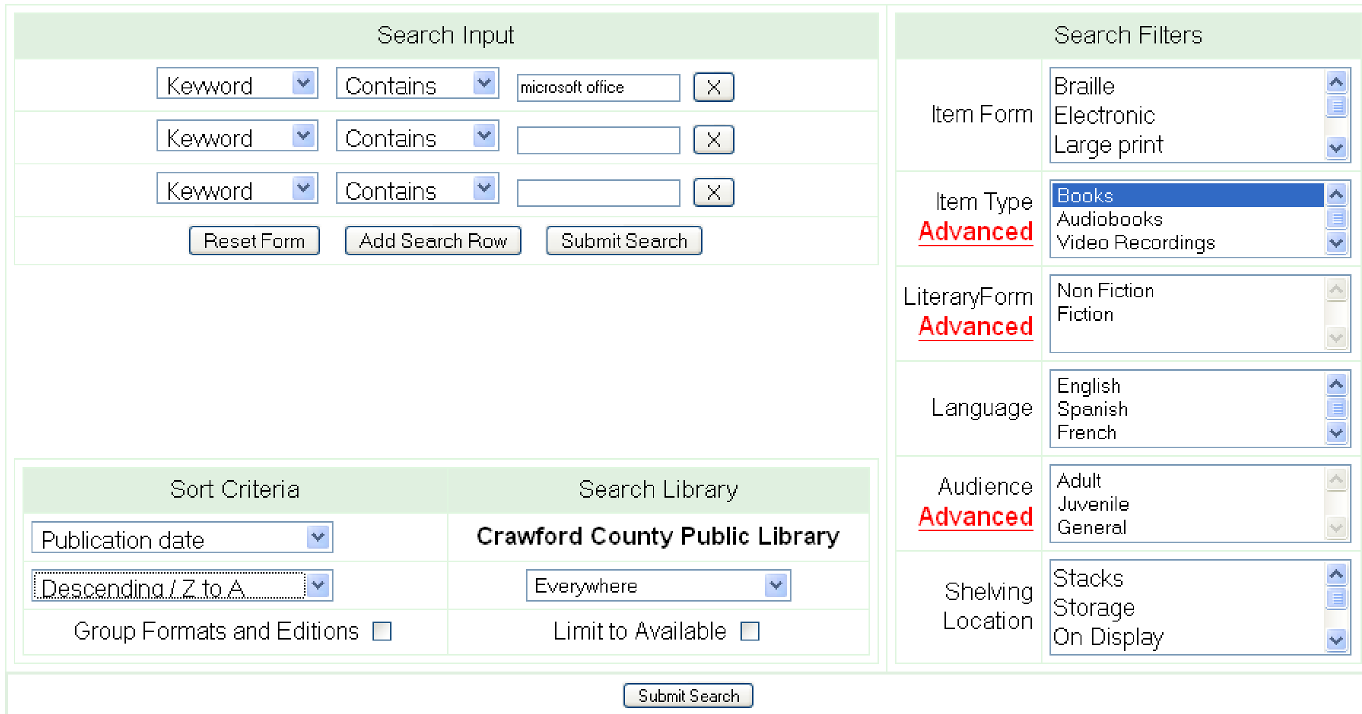
Basic catalog searching is initiated by clicking on the Home command link at the top left of the search screen.

A basic search, whether initiated from the *Basic Search* window or the *Advanced* window, in Evergreen results in a list of "hits" or search results. These hits appear, by default, in order of "relevancy". That is, the titles that are supposed to be the closest match to your search strategy should appear first in the list, then in decreasing order of relevancy.

For example, a search on keywords "king shining" should result in a list of titles of which would include "The Shining" by Stephen King. But what if you want a sorted by title list? This is where the *Advanced* search comes in to use. Enter your search input as author contains Isaac Asimov. Look down to Sort Criteria. Change Relevance to Title. You probably want to leave it in ascending (A-Z) order, but you could reverse it if you wanted to, to have Z-A order. Submit your search, and you should end up with a list of titles by Isaac Asimov, in title order.

Now what if you want a list of books about Microsoft Office, but you want the newest books listed first. OK, in Advanced Search again, enter your search input as keyword contains Microsoft Office. Using the *Search Filters* you can click to limit your search type to Books, to block out any other formats in your hit list. Under Sort Criteria, change Relevance to Publication Date. Here you do want to change the order to Descending (Z-A), so that you get the newest books first. You should get a list of books that have something to do with

Microsoft Office, with the newest titles listed first.



Your search results depend on how the title was cataloged; if there is no date in the bibliographic (MARC) record, it cannot be sorted by date. Titles with no date in the MARC record appear FIRST in a Publication Date-sorted hit list. If you have questions about why a particular title appears in what seems to be the wrong place in a sorted list, take a look at the MARC record. You may find your answer there!

Another helpful tip: If you just want the author's latest work and don't want to scroll through all those undated records, enter the author's name and 2008 (or 2009) in the keyword search. Remember that your Advanced Search can also be sorted by Author. Other search filters can be applied in the Advanced Search as well. Keep in mind that these, too, are dependent upon accurate and complete cataloging to work correctly.

The following are some important facts to remember when searching the catalog:

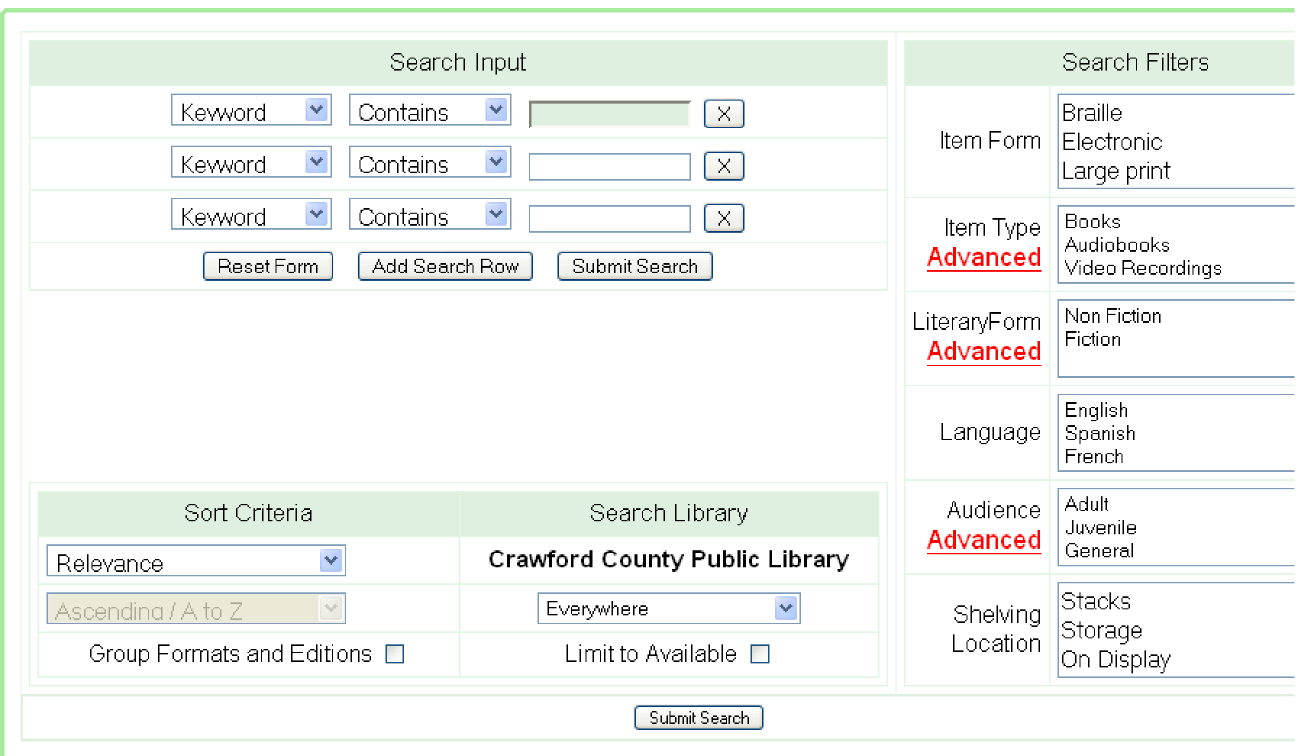
- All search terms are joined by default. e.g., a search for Harry Potter is seen by the search engine as Harry *and* Potter.
- Leave a space between initials (e.g., use j k rowling not jk rowling); periods are optional. Also the order last name first or first name last name should not matter (e.g., king stephen or stephen king are both acceptable); a comma to set off last name from first is optional.
- Boolean operators such as *and, or, not* are searched for regularly, and are not considered special.
- Phrase searching is accomplished by using quotation marks to enclose the phrase. For example “harry potter”. By insisting on phrase search you might be missing good results accidentally. For example, a search for “Alexander Bell” (with quotes) will miss the material that refers to Alexander *G.* Bell.
- Attaching a minus sign immediately before a word indicates that you do not want matches that contain this word to appear in your results. The minus sign should appear

immediately before the word and should be preceded with a space. For example, in the query .45-caliber, the minus sign is used as a hyphen and will not be interpreted as an exclusion symbol; whereas the query .45-caliber –fury will search for the words ".45-caliber" but exclude references to fury. You can exclude as many words as you want by using the **-** sign in front of all of them, for example [caliber –fury -manhunt].

- By default, search terms are stemmed. So, for example, a search for dogs will also return hits with the word dog.
- The *****, or wildcard, is a little-known feature that can be very powerful. If you include ***** within a query, evergreen treats the star as a placeholder for any unknown term(s) and then find the best matches. For example, the search harry * will give you results about material with harry in the title.
- + Term: By attaching a **+** immediately before a word (remember, don't add a space after the +), you are telling Evergreen to match that word and exclude others. For example harry * returned 2600 hits, harry * +rowling only returned material by rowling that included harry (plus string).

Advanced Search Details

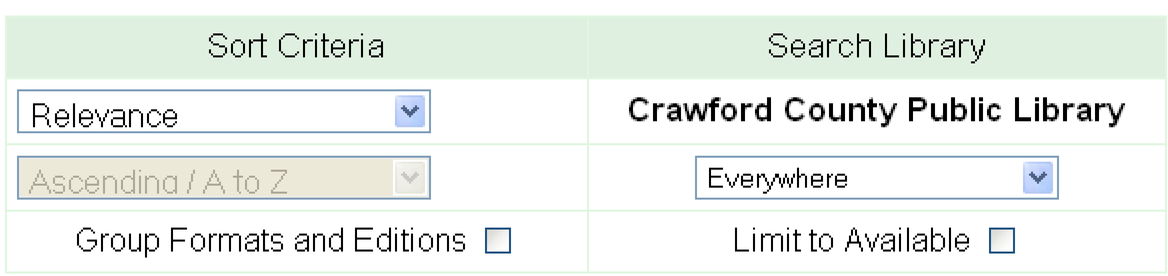
In the center of the screen are 3 lines of default search boxes, which have 3 search elements. In the first box to the left, the search can be limited to Keyword (default), Title, Author, Subject, or Series. Keyword searches will pick up just about everything in the record, and are broader searches than are Title, Author, Subject or Series searches where searching is limited to the single, selected field.



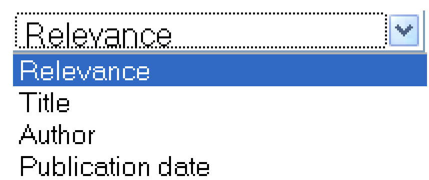
The middle box allows you also choose whether your search term(s) can be limited to Contains i.e., contained within the fields searched (default), Does not contain i.e., excluded from the fields searched, or Matches Exactly i.e., included as written exactly within the fields searched. If you type in a single word title and choose “Matches Exactly”, the results list will contain many multi-word titles which contain your search term. The specified search term should be listed first in the relevance sort.

The quotation marks (" ") used in phrase searching force the search engine to look for the words in a phrase together and in the original order. If you put words in quotes, the search engine will not search for other forms of these words.

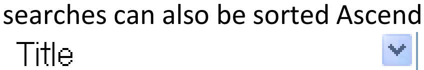
Beneath the Search Input boxes are three buttons. The first is Add Search Row. Clicking on this button will create an additional search row. Clicking on the third button, *Submit Search* will enter the search. Clicking on the middle button, Clear Search Rows, will clear all the search criteria added. Notice that clicking on the X to the right of each row will remove that row from the screen. Be sure to use the *Submit Search* button to enter the search.

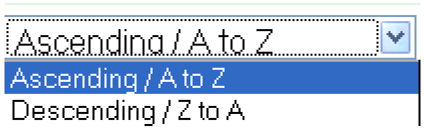


Beneath the Search Input box are sections for *Sort Criteria* and *Search Library*. Both have drop-down menus.



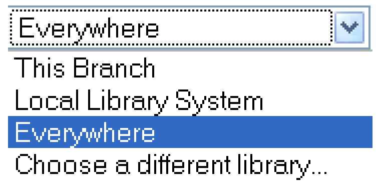
Sort Criteria enables the user to sort the search results by Relevance (most to least relevant) (default), Title, Author, or Publication date. Title or Author searches can also be sorted Ascending A to Z or Descending Z to A.





Below the Sort Criteria is the option to *Group Formats and Editions*. Selecting this option (click on the checkbox), groups together all search results that meet the search criteria without regard for an item's form, type or edition. This grouping produces results that would, for example, display all items--books, video recordings, audio books, etc.--with the title, Last of the Mohicans, found in the SC Lends system, a regional library, or a specific library.

The *Search Library* section allows the user to specify which library/libraries will be searched. Selecting "Choose a Different Library. . ." reveals a list of SC Lends libraries organized by regional affiliation. Each regional library is represented by a folder; click on a folder to display the libraries and branches associated with a specific regional library. This option allows you to search a regional system other or a specific library or branch within SC Lends, including those in Beaufort Library System.



The user can also click on the box labeled *Limit to Available* to limit the search only to those copies that are available for checkout.

Search Results Screen

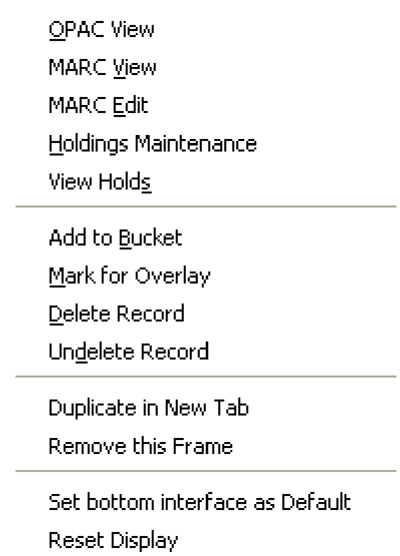
Searching the Evergreen catalog produces a list of results similar to that shown below. The *Title Details* view shows title and author information, as well as icons that indicate the format in which the title is available.

Clicking on the title reveals the Record Summary for that title. In a pane at the top of the page, the Record Summary (see below) provides information about the title, such as its TCN, publication date, and the date on which the record was last edited.

Two sets of navigation aids (*Start, Previous* or <<, *Next* or >>, and *End*) allow you to advance through the titles associated with the Record Summary.

Actions for this Record

The pull-down menu labeled *Actions for this Record* offers access to a number of functions related to bibliographic records.



- *OPAC View* – Switches to the OPAC view. You can switch back to the OPAC View by selecting this option if you are currently viewing one of the other items below.
- *MARC View* – Shows the MARC record for the item.
- *MARC Edit* – Shows the MARC Editor for making changes to the MARC record. Do not use this option! It is for catalogers only!
- *Holdings Maintenance* – Shows the Holdings Maintenance view for the record. Do not use this option! It is for catalogers only!
- *View Holds* – Shows the holds for the record. See the Holds Instruction sheet for more information.
- *Add to Bucket* – Click on this to add the title to a bucket for sharing or more processing. You will be prompted to select the bucket from a list created under your logon, or to create a new bucket. You may view and edit your buckets by clicking on the "Edit" Function on the toolbar and selecting "Record Buckets."
- *Mark for Overlay* – Do not use this option! It is for catalogers only!
- *Duplicate in New Tab* – Opens the record (in its default view) in a new tab. Do not use this option! It is for catalogers only!
- *Remove this Frame* – Removes the top information frame and shows only the bottom view. NOTE: If you remove the top frame, you remove the "Actions for this Record" button, so there is no way to get it back again. This only applies to a particular record, so you must go to another record and use the "Actions for this Record" menu and choose

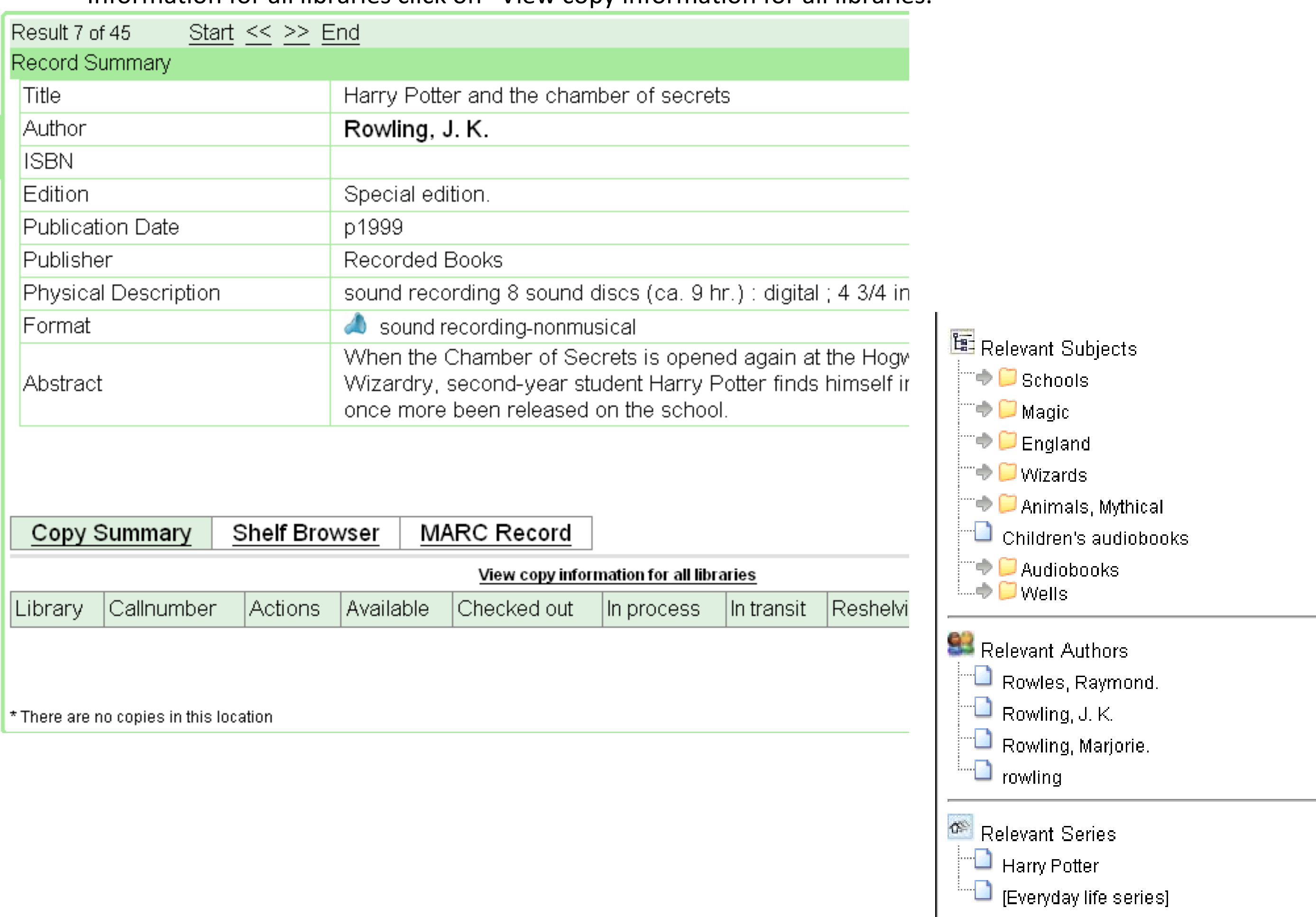
"Reset Display" to get it back.

- *Set bottom interface as default* – You can choose which view should be the default view for records: OPAC, MARC, MARC Editor, Holdings Maintenance, or Holds. Set the current view to whichever you prefer, then select Set bottom interface as default. Then, when you open item records, the display will use that view.
- *Reset Display* – Restores the system defaults, removing preferences you have chosen using the options above.

Title Details

Included on the same Evergreen Client screen as the Record Summary is Title Details (see below), which provides specific information about the items associated with this record. That information may include:

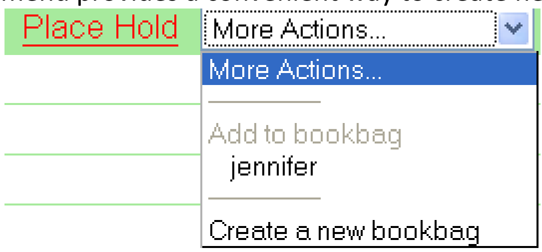
- title
- author
- ISBN
- edition
- publication date
- publisher
- physical description
- format (shown as an icon and a one- or two-word identifier)
- call number
- Indication of availability (available, checked out, in transit, etc.)
- links to other information, including reviews and tables of contents as displayed in the Staff Client, Title Details will initially show only copy
- Information for the library at which the client is being used. To view copy
- Information for all libraries click on "View copy information for all libraries."



If you are viewing copy information for all libraries and wish to view only copy information for your library, click on *View copy information for this location only*. Located in the left frame are *Relevant Subjects*, an expandable list of subjects related to the items associated with this record. Clicking on a related subject launches a new catalog search based on that subject heading.

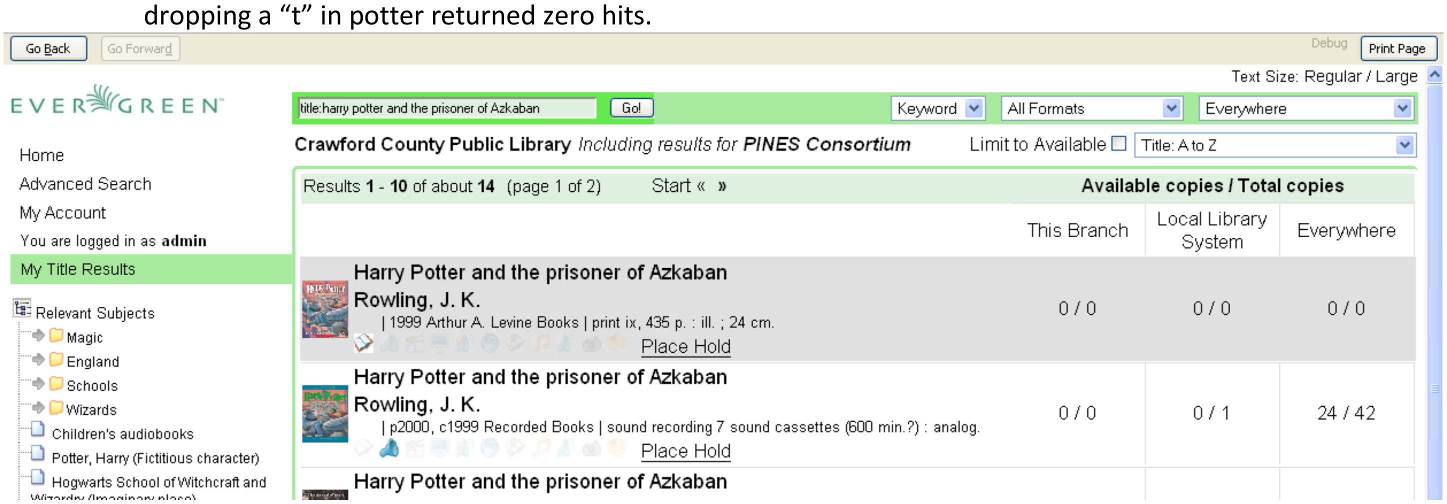
Title Details - More Actions

Another feature on Title Details is a drop-down menu labeled *More Actions* (see below). This menu provides a convenient way to create new bookbags and to add titles to existing bookbags.

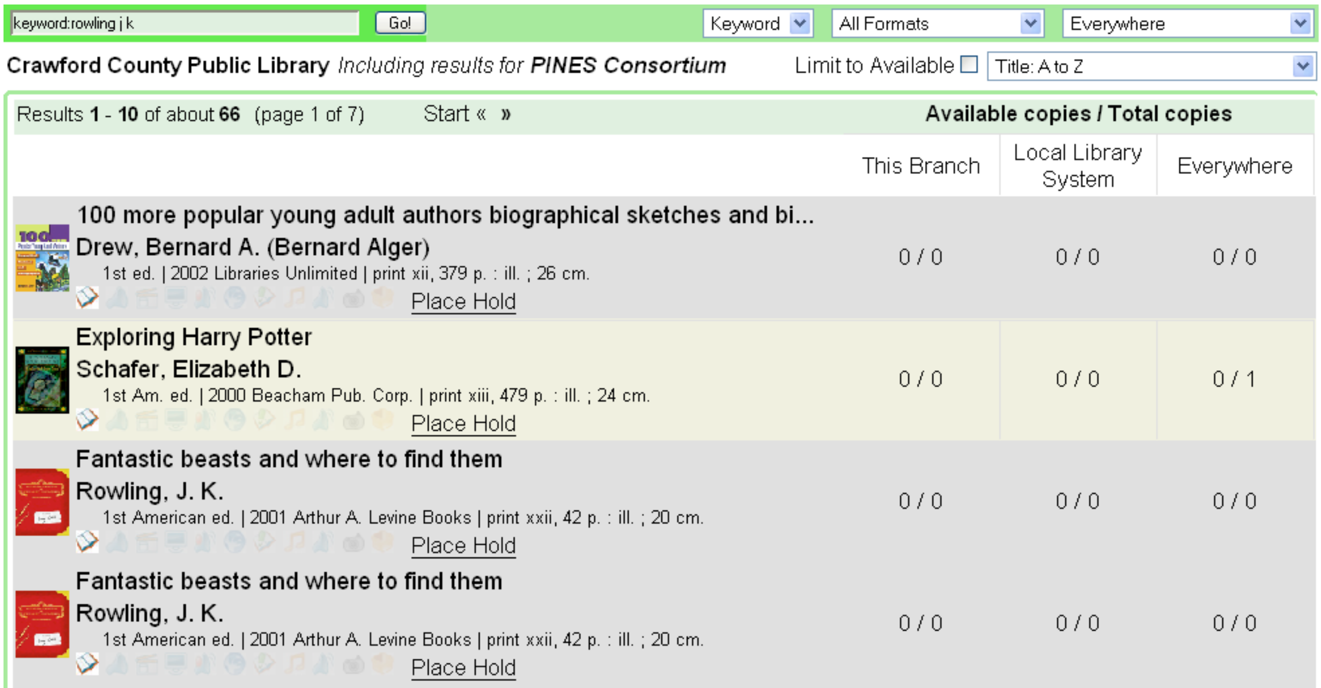


Searching from the Results Screen

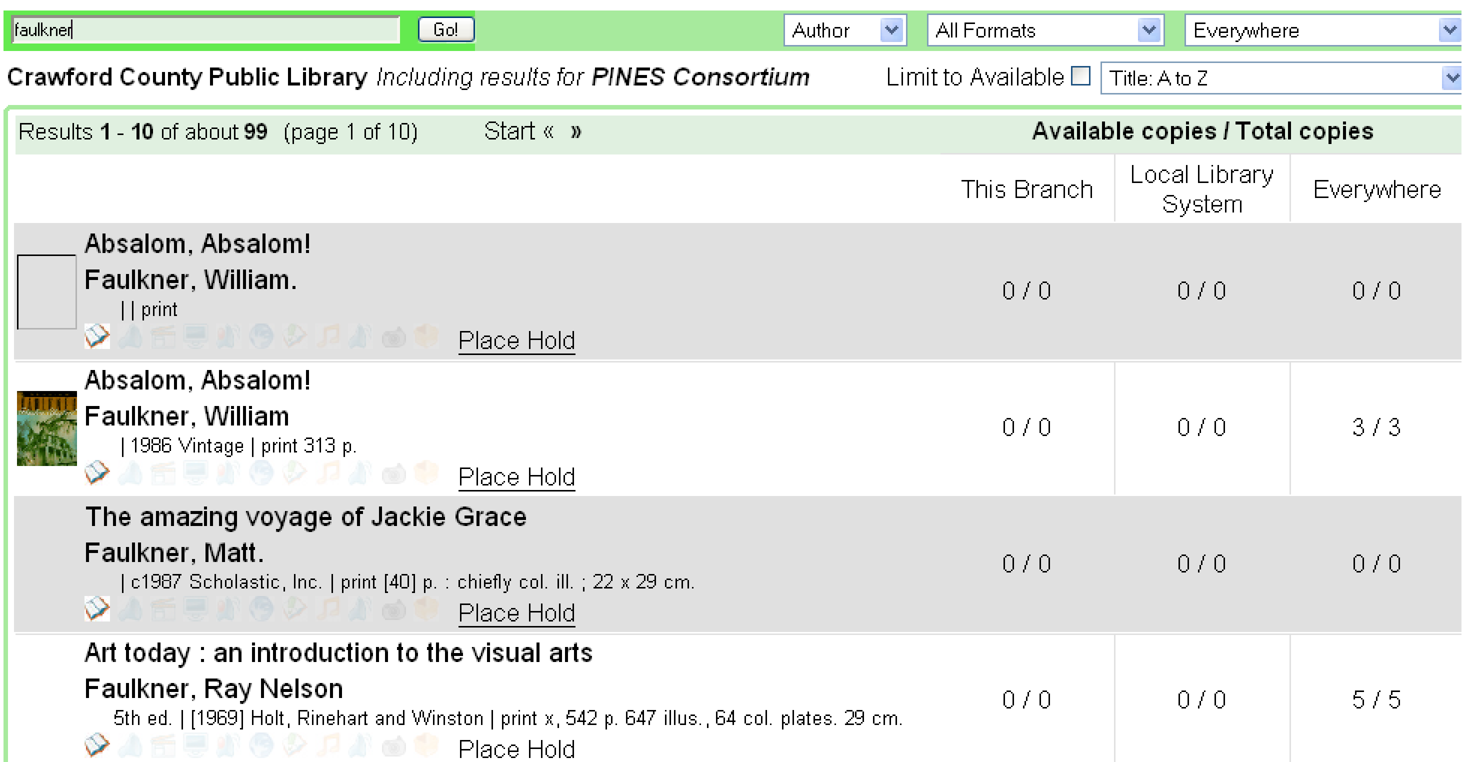
When searching for author, subject, title or keyword in the *Advanced Search* mode, the search results screen will display the type of search in the top left hand box of the screen. For instance, a title search on harry potter and the prisoner of Azkaban, the search screen will display title: harry potter and the prisoner of Azkaban in the search box in the top left of the screen. Note: Spelling is important. In this example miss spelling Azkaban resulted in zero hits. Even dropping a "t" in potter returned zero hits.



If the user performs an author search on rowling, j k from the initial search screen, the results screen would display author: rowling j k



The same type of display will occur with a keyword or series search from the first advanced search screen.
While in Advanced Search mode, the user can change the searches in the search bar to the left by typing in a different value, i.e. author: faulkner

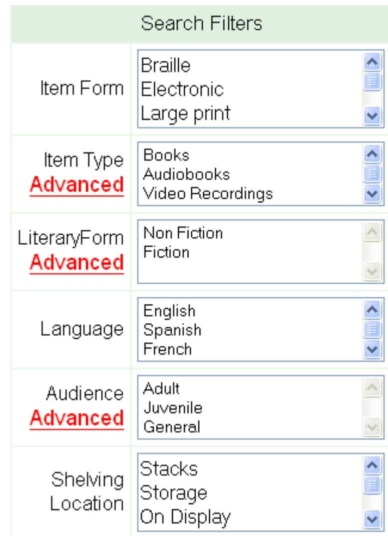


Searches can be done for keyword or series in the same manner. Users may also abbreviate the search terms, i.e.

- au: for author. Note follow the abbreviation with a colon.
- ti: for title
- kw: for keyword
- se: for series

You may also combine searches by entering 2 or more search arguments at once in the search box, e.g., au: faulkner ti: dying.

Search Filters



To the right of the Advanced Search screen are the Search Filters boxes and their associated drop-down choices that display additional filters. The user can search by *Item Form* (Braille, large print, microfilm, etc.), *Item Type* (books, audio books, music, etc.), *Literary Form* (fiction, non-fiction, etc.), *Language* (English, Spanish, French, etc.), and *Audience* (adult, juvenile or general). *Item Type*, *Literary Form*, and *Audience* can be further specialized using the *Advanced* links (in red). Clicking on these links will provide the user with more specialized filters within the broader category. When the advanced filters are displayed, the links to the left will change to Basic to allow the user to return to the basic filter choices.

Changing Shelving Location

Click on ***Search > for Copies by Barcode*** to get to the *Item Status* screen. Scan in the barcodes. Scan 20 or less per batch, since the computer will likely freeze up if you try to do more than that at a time. Select all of the items on the list by clicking on the top item and then holding down the Shift key while you click on the bottom item.
Click on the *Actions for Selected Items* button and then select *Edit Item Attributes*.
On the Item Attributes screen, change the Shelving Location, to what you need the new shelving location to be. Be sure to click on *Apply*, and wait for the screen to turn green to indicate that the change has been applied.
Click on *Modify Copies* on the bottom right of the screen. You should get a pop up box that says Copies Modified.

Check in Serial Items

This release of Evergreen does not support serials.

Circulation Reports

System functionality is improved through the use of regularly scheduled maintenance reports used to keep data and records current. Reports are available for all types of records used in the library. The following section describes some of the reports used in circulation to manage customers and the Libraries' collection.
Reports are scheduled to run immediately, or periodically. Distributions of the reports are handled through email to designated authorities in each branch.

Pull List for Hold Requests

Pull List for Hold Requests is available at any time by clicking ***Circulation > Pull List for Hold Requests***. This Window lists hold Items which need to be located at the branch to satisfy a customer's hold request. The process is described starting on page Pull Holds Report List page 121

MISSING/WITHDRAWN/DISCARD ITEMS WITH HOLDS

Since holds without and expiration date do not automatically expire, hold requests that are not filled need to be reviewed after a time to determine if they can be filled in a different manner. This report lists items that cannot be filled because there are no available copies in the system, to fill the request. Refer to the section on missing hold items (page 123) for further information.

OLD TRANSITS FOR HOLDS

This report is sent to all Circulation Supervisors or Branch Managers every two weeks, and lists items that have not been received from "in transit" to satisfy a **HOLD**. Refer to page **Error! Bookmark not defined.** For further information.

OLD TRANSITS TO BRANCH FOR SHELVING

This report is sent every two weeks to the circulation email of each branch, and lists items that have not been received from "in transit" for shelving at the home branch location. The report is used to find items that may not have been received and reroute to the correct branch.
The receiving library needs to check its shelves to make sure the item was not shelved without proper receiving/checking-in procedure. Any items found should be received and reshelved.
If the item is listed on two successive reports, then the owning library should mark the item missing (page 128). This process requires proper record keeping, on the part of the responsible staff person, so that previous reports can be searched for repeat items.

OLD TRANSITS FROM BRANCH FOR SHELVING

Similar to above, this report is sent every two weeks to branch's circulation email, and lists items that have been sent to another branch but not received from "in transit" for shelving at the destination branch. The report is used to find items that should have been put in transit to the home branch, but were, most likely, shelved at the non-owning branch in error.
The sending branch needs to check its shelves (including Hold Shelves) for the items to make sure they are not at their branch in error. Any items found should be put in transit to the owning branch.

CLAIMS RETURNED ITEMS

This report is sent monthly to the circulation email of each branch, and includes items that have been claims returned for 3 or more months. Refer to page for further information.

MISSING ITEMS REPORT AFTER 1 MONTH

This report is sent monthly to the Circulation login of each branch, and includes items which were *Mark Item Missing* (128) the previous month and allows staff to check for them again. The items listed should be checked on the shelf to see if they can be found. The item may have been out of place, or being used, or not on shelf at the time item was previously looked for.
Any items found should be checked in. Check to see if the item had been properly discharged before shelving. Since no fines are created for the MISSING user, they can be checked in

normally. Items not found will remain on the list, and checked again at 5 months, prior to the items being removed from the database.

MISSING ITEMS REPORT AFTER 5 MONTHS

This report is sent monthly to the Circulation login of each branch, and includes items which were on the *Missing Items Report* 5 months ago and allows staff to check for them again prior to the item being removed from the catalog record after 6 months of being missing.
The items listed should be checked on the shelf to see if they can be found. The item may have been out of place, or being used, or not on shelf at the time item was previously looked for.
Any items found should be checked in. Check to see if the item had been properly discharged before shelving. Since no fines are created for the MISSING user, they can be checked in normally.
Items not found will be processed automatically, after 6 months, and removed from the database.

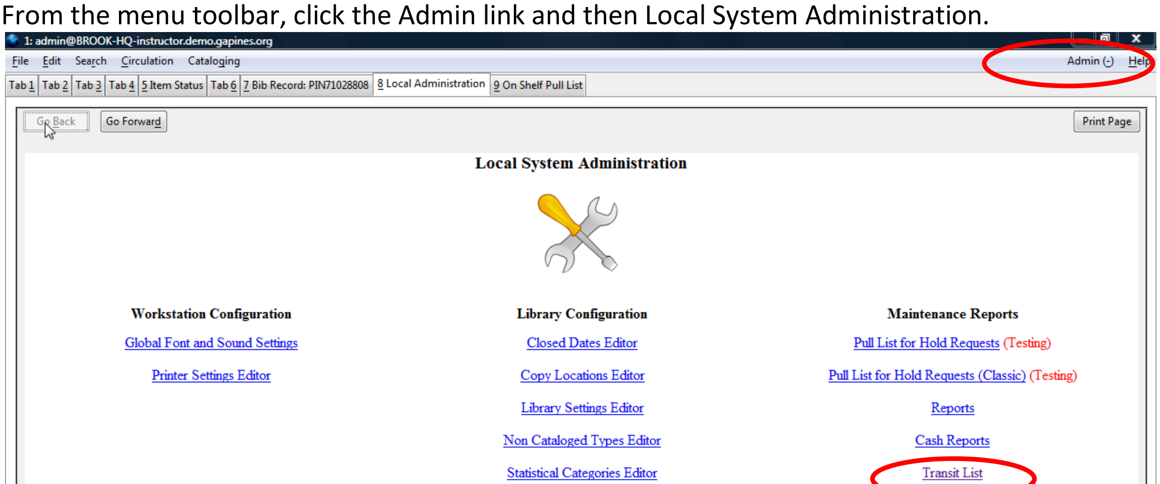
MISSING/DISCARD ITEMS WITH BILLS

This report is sent monthly to the Circulation Supervisor or designated staff member for fines to be removed from the items listed, and includes items that cannot be removed from the database because there are bills on the items. The bills must be removed before the item can be removed from the database.
Use *Item search and display* wizard and, searching by Item ID number, find the specific missing copy in the Catalog record. Use the call Number/Item tab and bill tab to reveal the outstanding bill.

Managing In-Transit Items

Overview

From the menu toolbar, click the Admin link and then Local System Administration.



On this page, select Transit List on the bottom right of the screen. It will display all items incoming and outgoing with a *Print* button. Print these out and troubleshoot all transits that have not been completed in a reasonable time.

Show Transit Item Information

To view the transit information for a particular item, if it's on the Hold list for a customer, from the customer's Holds list, add the following fields of information from the Column Picker:

- Transit Source (FROM library)
- Transitted On (Transit date)
- Transit Destination (TO library)

OR

To view transit information for an item NOT on a holds list,

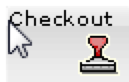
- Search for the title in the catalog, drill down to the title details level and locate the particular item number that you want to investigate.
- Highlight the item number and press **Ctrl+C** to copy the number.
- In a new tab, press F5 to *Search for items by barcode*. Press **Ctrl+V** to paste in the number and press *Enter*.
- Click on the title to highlight it and click *Actions for Selected Items*.
- Click *Show Item Details*. If the item is in transit you will see it the In Transit information.

Appendix 1

How We Did It in Workflows / How To Do It in Evergreen

Workflows Key | **Evergreen** | **Evergreen shortcut**

Checkout



Circulation > Checkout Items F1
Scan in card barcode

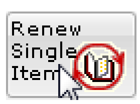
Discharge/Checkin

Circulation > Checkin Items F2
Scan in item barcode

Renew User Charges

Search > For Patron By Barcode F1
Click on *Items Out* button
Click on the items to be renewed
(To select several things at once hold Shift key down while clicking)
Click on *Actions for Selected Items* button
Click on *Renew*
Click on *Print Receipt* if you need one

Renew Single Item

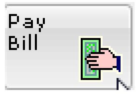


Search > For Copies by Barcode F5
Click on item
Click on *Actions for Selected Items* button
Click on *Renew*
Click on *Print Receipt* if you need one

Bill a User

Search > For Patron By Barcode F1
Click on *Bills* button
Click on *Bill Patron* button
Select *Billing Type*
Type in *Amount*
Click *Submit This Bill* button

Pay Bill

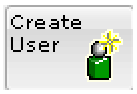


Search > For Patron By Barcode F1
Click on *Bills* button
Select *Payment Type*
Type in amount of *Payment Received*
Click *Apply Payment*! Button

User Display

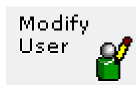
Search> For Patron by Barcode F1
OR ***Search> For Patron*** F4

New User Registration



Circulation> Register Customer Shift + F1

Modify User



Search>For Patron by Barcode F1
Click on *Edit* button
Make needed changes
Click on *Finish*
Click on *Save User* button

Copy User

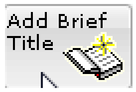
Search>For Patron by Barcode F1
Click on *Edit* button
Click on *Finish*
Click on *Save and Clone User* button

Renew Privileges

Search> For Patron by Barcode F1
Click on *Edit* button
Click on *Groups and Permissions*
Type in the date one year from today
Click on *Finish*
Click on *Save User* button

Remove User

Search> For Patron by Barcode F1
Click on *Edit* button
Click on *Groups and Permissions*
Uncheck the box next to *Active*
Click on *Finish*
Click on *Save User* button

Add Brief Title 

Circulation> Checkout Items F1
Scan barcode
Check to confirm
Click on *Pre-Cat* button
Type in Title
Type in Author
Click on *Checkout*

Change Item Barcode 

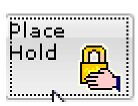
Cataloging>Replace Barcode
Scan old barcode in
Scan new barcode in

Mark Item Missing 

Cataloging>Show Copy Status by Barcode F5
Click on item
Click on *Actions for Selected Items*
Click on *Edit Item Attributes*
Next to Status, click and select *Missing*
Click *Apply*
Click *Modify Copies*

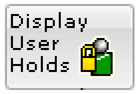
Mark Item Lost 

Search> For Patron by Barcode F1
Click on *Items Out*
Click on *lost item*
Click on *Actions for Selected Items*
Click on *Mark Lost* (by Customer)
Customer will automatically be charged price of book or $25 if no price is listed

Place Hold 

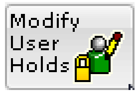
Search> The Catalog F3
Look up the item customer wants
If item has several parts or volumes,
Keep clicking on the title of the volume wanted, until My Title Details is highlighted in green on the left side. Scroll down to Copy Status. Place hold on each volume wanted.
Click on *Place Hold* button
Scan in user barcode
Click *Submit* (Place Hold For Me is only for placing your personal holds.)

Display User Holds



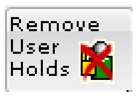
Search> For Patron by Barcode F1
Click on *Holds* button

Modify User Holds



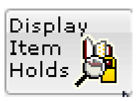
Search> For Patrons by Barcode F1
Click on *Holds* button
Click on item hold to be modified
Click on *Actions for Selected Holds*
Click on *Find Another Target*, Edit *Pickup Library*, etc.

Remove User Holds



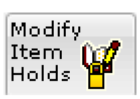
Search> For Patrons by Barcode F1
Click on *Holds* button
Click on item hold to be modified
Click on *Actions for Selected Holds*
Click on *Cancel Hold*

Display Item Holds



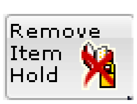
Search> The Catalog F3
Look up book
Click on title twice
Click on *Actions For This Record*
Click on *View Holds*
To see who is on hold:
Click on hold
Click on *Actions for This Hold*
Click on *Retrieve Patron*

Modify Item Holds



Circulation>Browse Holds Shelf
Click on item whose hold is to be changed
Click on *Actions for Selected Holds*
Click on action needed

Remove Item Hold



Circulation>Browse Holds Shelf
Click on item whose hold is to be removed
Click on *Actions for Selected Holds*
Click on *Cancel Hold*

Trap Holds

Circulation > Capture Holds Shift + F5
Scan in barcode
Print receipt

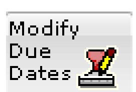
User Claims Returned

Search> For Patrons by Barcode F1
Click on *Items Out*
Click on item to be claimed returned
Click on *Actions for Selected Items*
Click on *Mark Claimed Returned*
Type in date returned

User Lost Card

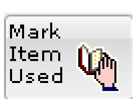
Search> For Patrons F4
Type in customer's name
Click *Search* button
Click on correct customer in list
Click *Retrieve Patron* button
Click *Edit* button
Click *Mark Lost* (under barcode number)
Scan new card in
Also give customer their new PIN
Click *Finish*
Click *Save User*

Modify Due Dates



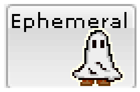
Search> For Patrons by Barcode F1
Click on *Items Out*
Click on item to modify its due date
Click on *Actions for Selected Items*
Click on *Edit Due Date*
Type in new due date
Click *OK*

Mark Item Used



Circulation> Use In-House Items F6
Scan item barcode

Ephemeral



Circulation> Checkout Items F1
Click on triangle to left of the word Barcode
Click on *Paperback Book*
Click on *Submit*
Type in number of paperbacks
Click *OK*

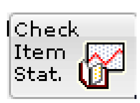
Check In Bookdrop Items

Circulation > Checkin Items F2
Click in Effective Date box
Change date
Click in Barcode box
Scan in item barcode

Item Search and Display

Search > For Copies by Barcode F5
Scan barcode
Click on item
Click on *Actions for Selected Item*
Show Last Few Circulations
For item price:
Click *View MARC*
Scroll down to 020 field
If listed, price is in C subfield

Check Item Status



Circulation > Show Copy Status by Barcode F5

Appendix 2

State Abbreviations

State/Possession	Abbreviation
ALABAMA	AL
ALASKA	AK
AMERICAN SAMOA	AS
ARIZONA	AZ
ARKANSAS	AR
CALIFORNIA	CA
COLORADO	CO
CONNECTICUT	CT
DELAWARE	DE
DISTRICT OF COLUMBIA	DC
FEDERATED STATES OF MICRONESIA	FM
FLORIDA	FL
GEORGIA	GA
GUAM	GU
HAWAII	HI
IDAHO	ID
ILLINOIS	IL
INDIANA	IN
IOWA	IA
KANSAS	KS
KENTUCKY	KY
LOUISIANA	LA
MAINE	ME
MARSHALL ISLANDS	MH
MARYLAND	MD
MASSACHUSETTS	MA
MICHIGAN	MI
MINNESOTA	MN
MISSISSIPPI	MS
MISSOURI	MO
MONTANA	MT
NEBRASKA	NE
NEVADA	NV
NEW HAMPSHIRE	NH
NEW JERSEY	NJ
NEW MEXICO	NM
NEW YORK	NY
NORTH CAROLINA	NC
NORTH DAKOTA	ND

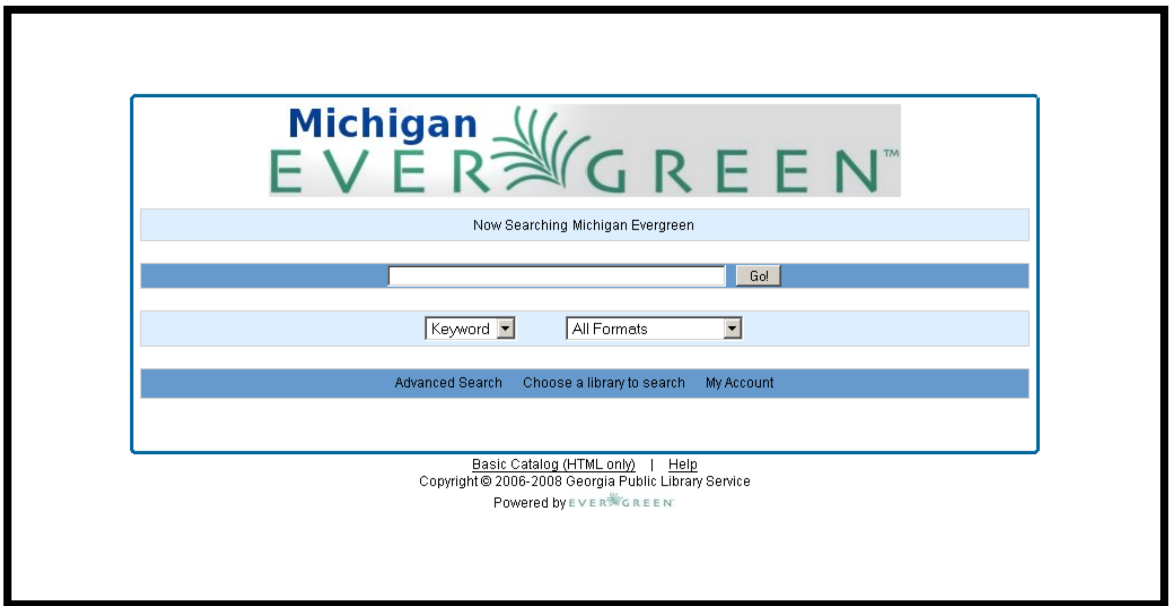
NORTHERN MARIANA ISLANDS	MP
OHIO	OH
OKLAHOMA	OK
OREGON	OR
PALAU	PW
PENNSYLVANIA	PA
PUERTO RICO	PR
RHODE ISLAND	RI
SOUTH CAROLINA	SC
SOUTH DAKOTA	SD
TENNESSEE	TN
TEXAS	TX
UTAH	UT
VERMONT	VT
VIRGIN ISLANDS	VI
VIRGINIA	VA
WASHINGTON	WA
WEST VIRGINIA	WV
WISCONSIN	WI
WYOMING	WY

Appendix 3

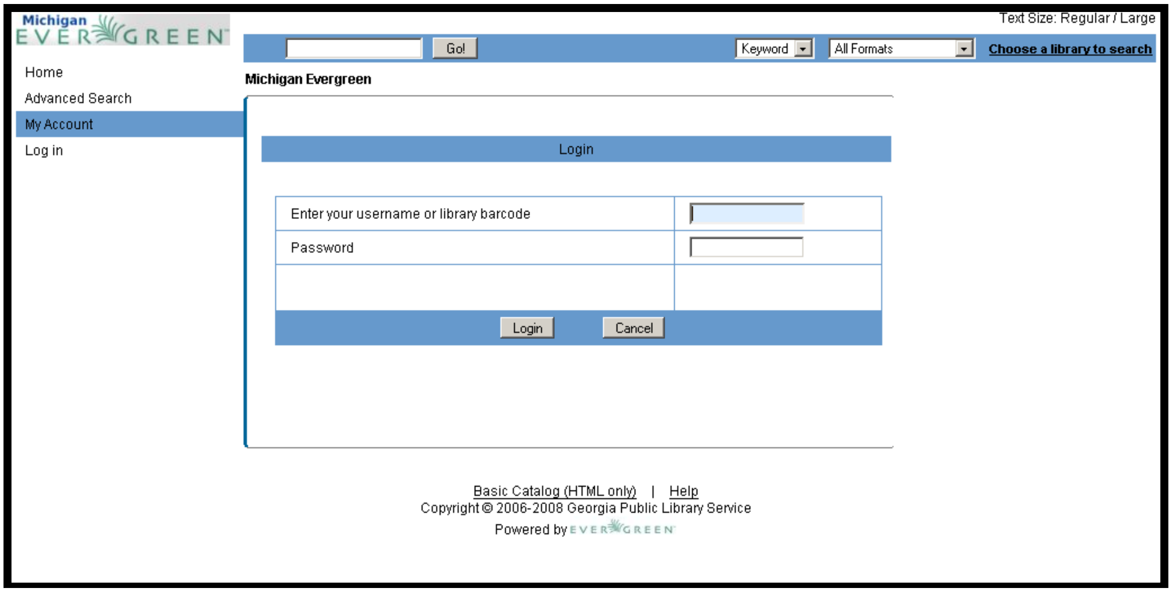
OPAC Modifications of Customer Records

Changing First-Time Password in the OPAC

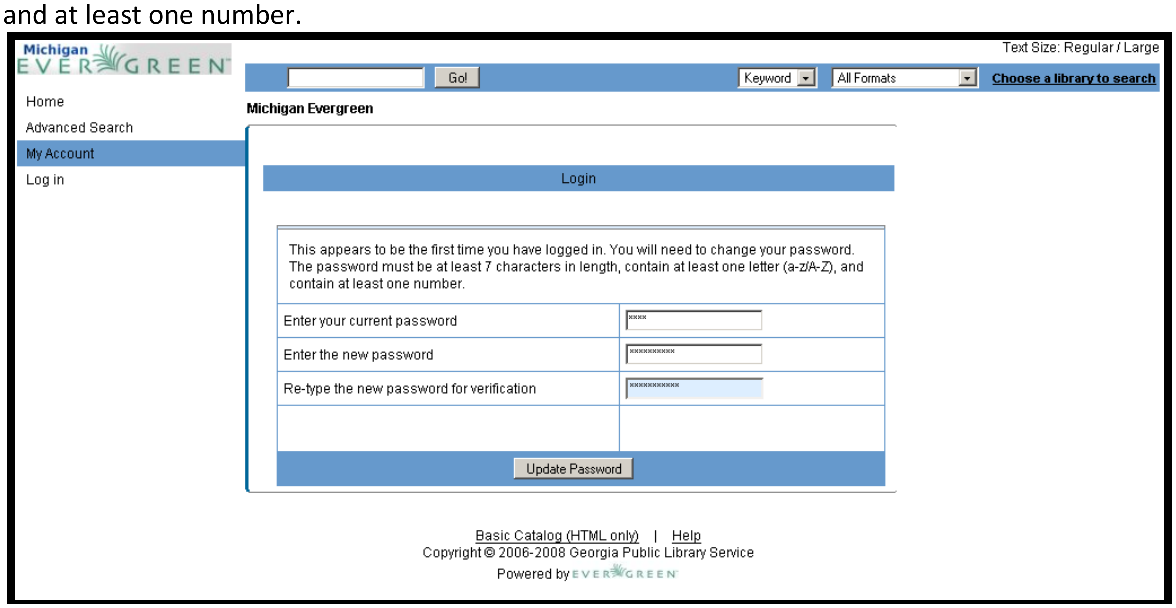
After new Customer Records are created in the Staff Client, the first-time Customers log into their accounts in the OPAC client The Customer will be asked to change the temporary 4-digit password to a seven-digit password (including at least one letter). Passwords are case sensitive. A Customer can access their account over the Internet by navigating to the Library's OPAC and clicking on My Account on the lower right of the screen below the search box.



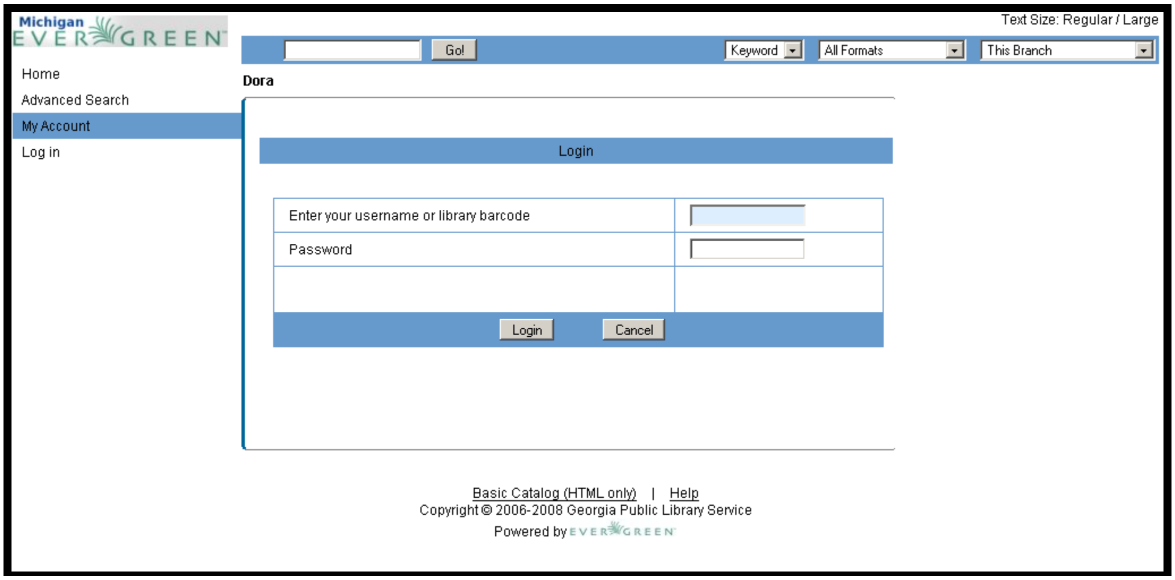
A log in screen will appear requesting the Customer's username (library card barcode) and password. The Customer needs to enter in their barcode and the 4-digit temporary password that was generated at registration. Then the Customer clicks on the Login button.



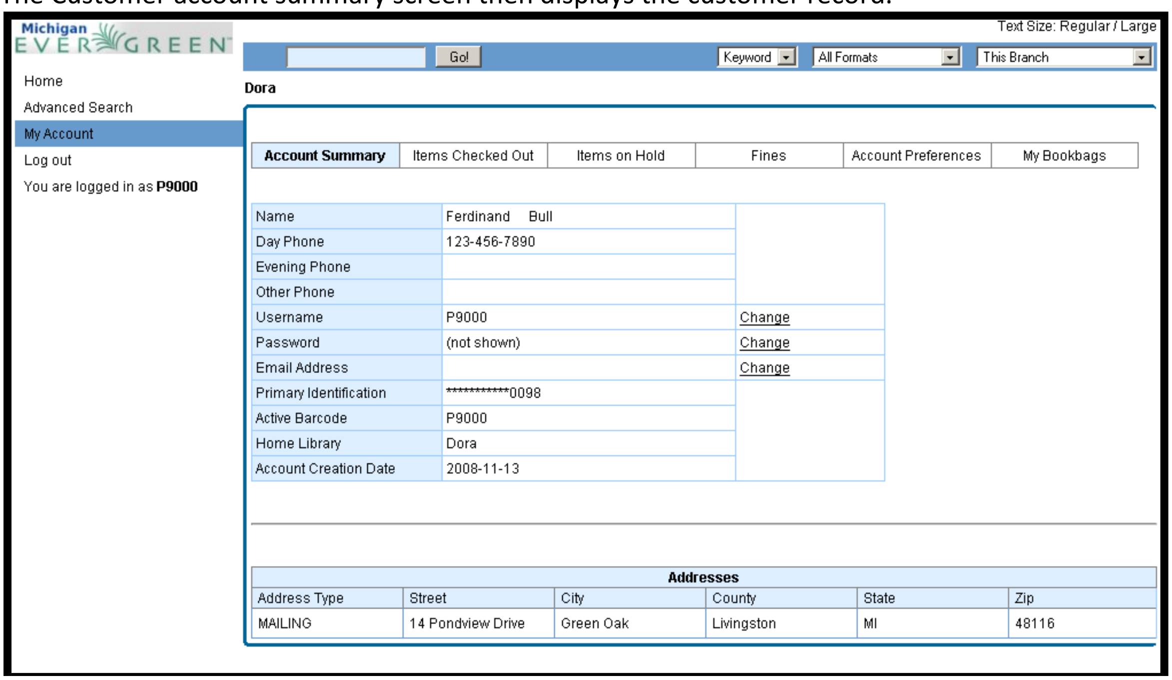
A screen then appears prompting the Customer to enter a new password. First the Customer must enter the temporary 4-digit password, followed by a new password and enter it a second time to confirm.
The password must have at least seven characters in length and must include at least one letter and at least one number.



The Customer then clicks on the button labeled *Update Password*. If all is correct, a message will appear stating that the password was successfully updated. The Customer then clicks on *OK*. The Customer must log in once more using their ID and new password.



The Customer account summary screen then displays the customer record.

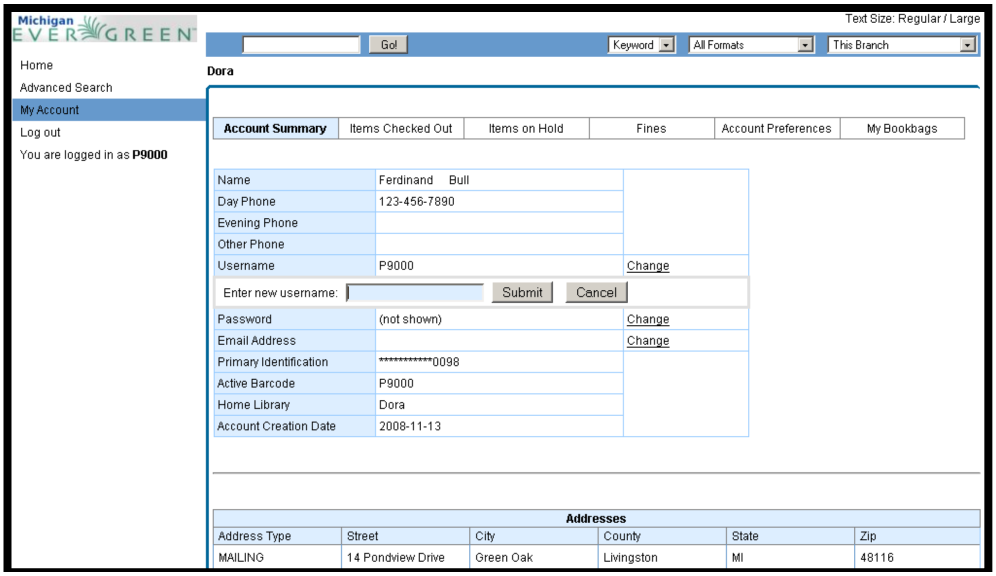


Customers may change the information in three areas:

- Username,
- Password
- Email address.

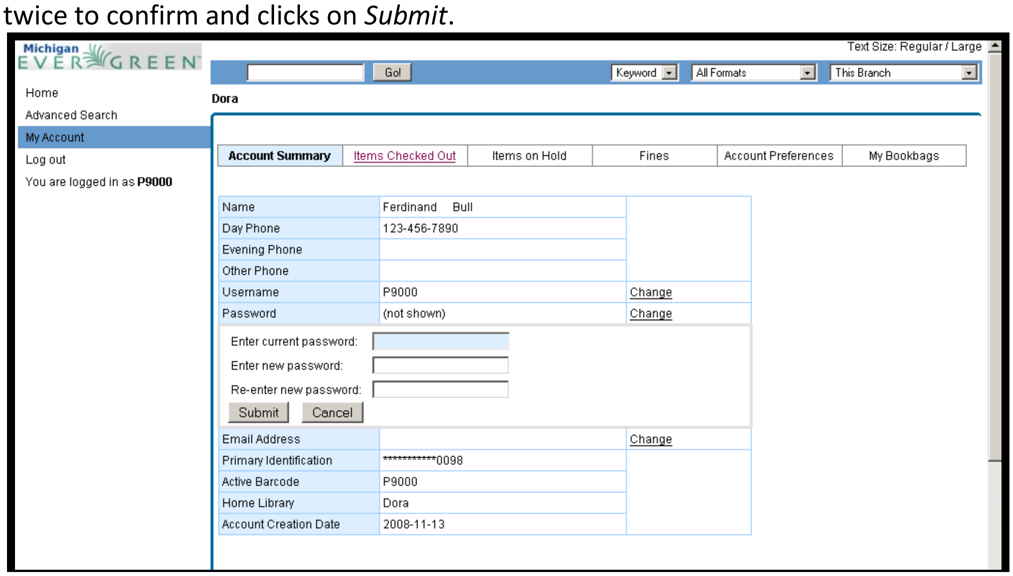
Changing the Username

The Customer username is changed by clicking on the *Change* button to the right of the Username. The user is prompted to enter a new username and does so, then clicks on *Submit*.



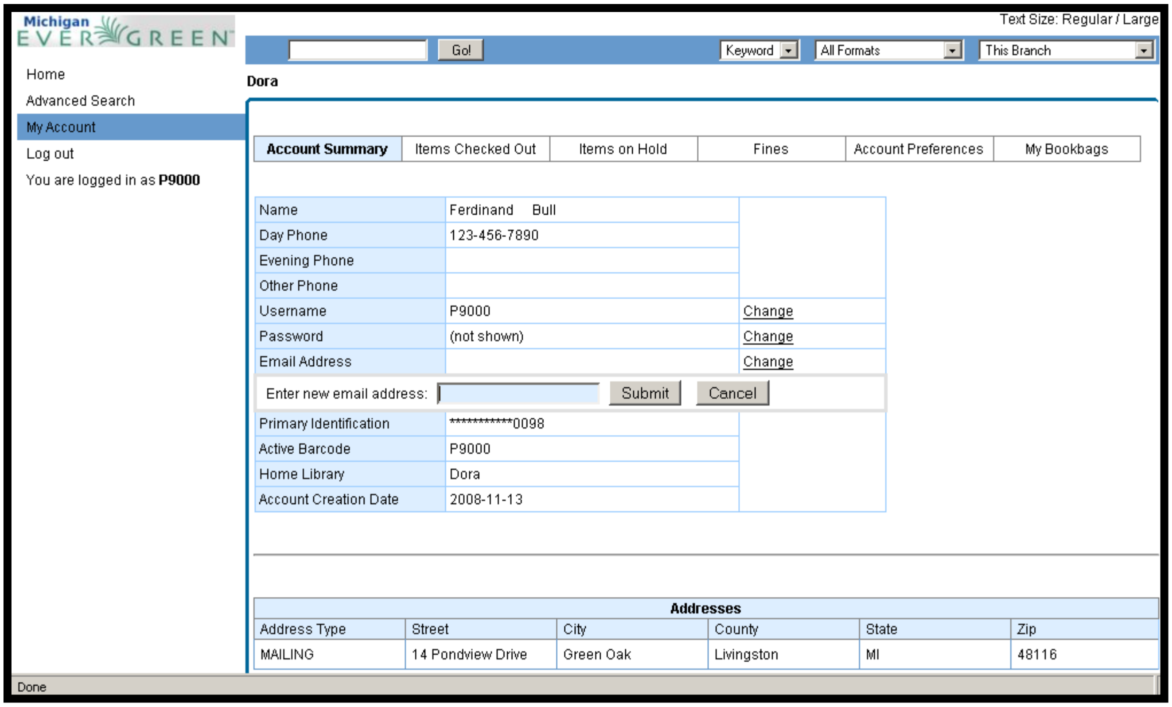
Changing the Password

The user can change the password by clicking on the *Change* button to the right of the password slot (which is not shown). The user then enters the old password once and the new password twice to confirm and clicks on *Submit*.



Changing the email Address

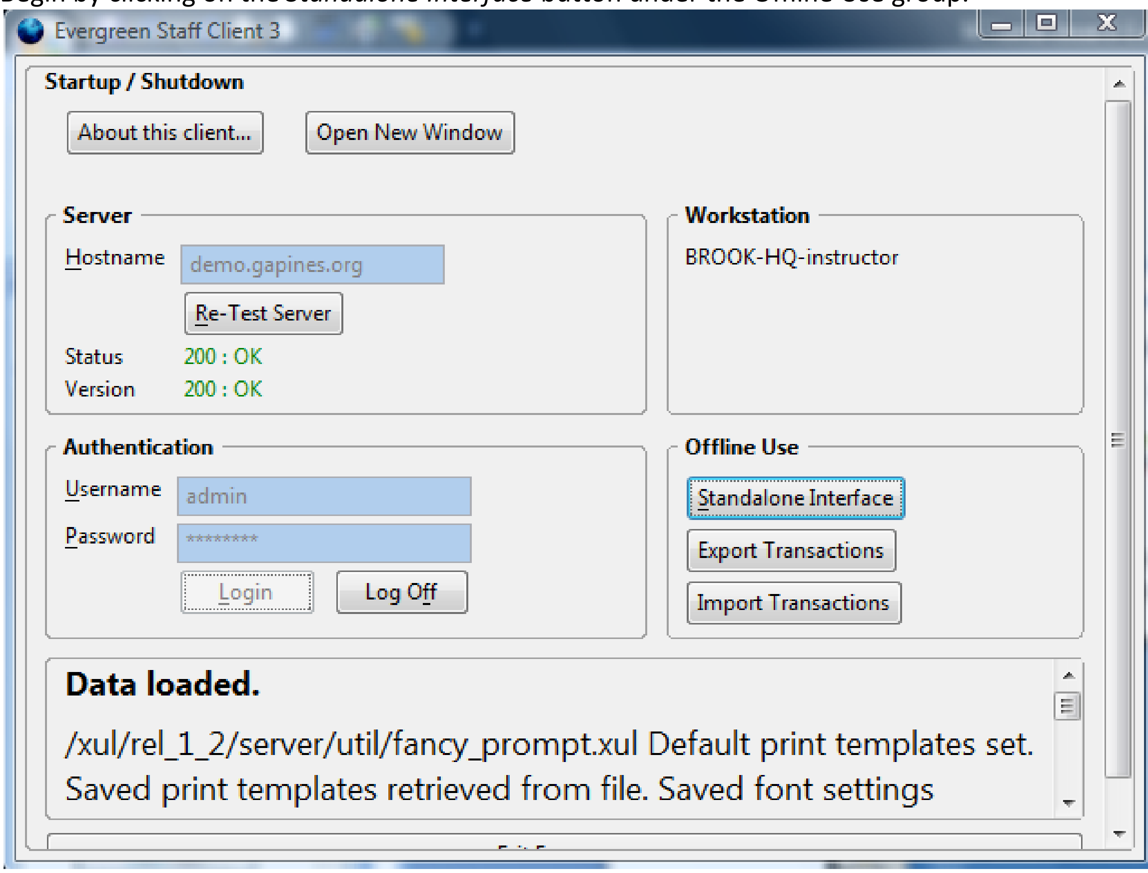
Customers can change their email address by clicking on the *Change* button next to the email address, entering a new email address at the prompt, and clicking on the *Submit* button.


Michigan EVERGREEN
Text Size: Regular / Large
Go!
Keyword
All Formats
This Branch
Home
Advanced Search
My Account
Log out
You are logged in as P9000
Dora
Account Summary
Items Checked Out
Items on Hold
Fines
Account Preferences
My Bookbags
Name
Ferdinand Bull
Day Phone
123-456-7890
Evening Phone
Other Phone
Username
P9000
Change
Password
(not shown)
Change
Email Address
Change
Enter new email address:
Submit
Cancel
Primary Identification
************0098
Active Barcode
P9000
Home Library
Dora
Account Creation Date
2008-11-13
Addresses
Address Type
Street
City
County
State
Zip
MAILING
14 Pondview Drive
Green Oak
Livingston
MI
48116
Done

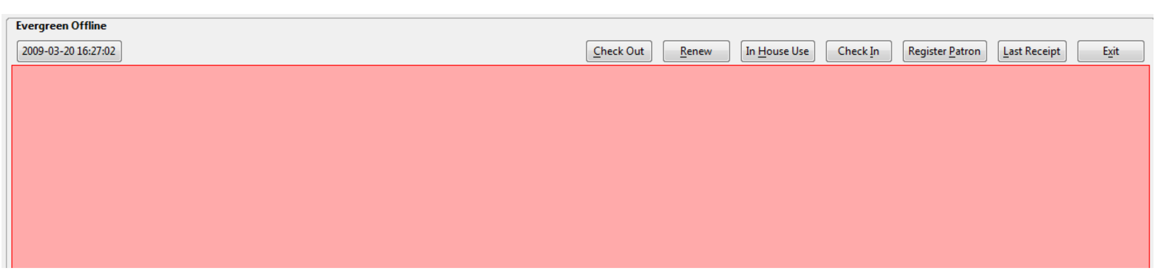
Appendix 4

Offline Use

When the Evergreen server is unavailable it is time to switch over to off-line use via the Standalone Interface.
Begin by clicking on the *Standalone Interface* button under the Offline Use group.

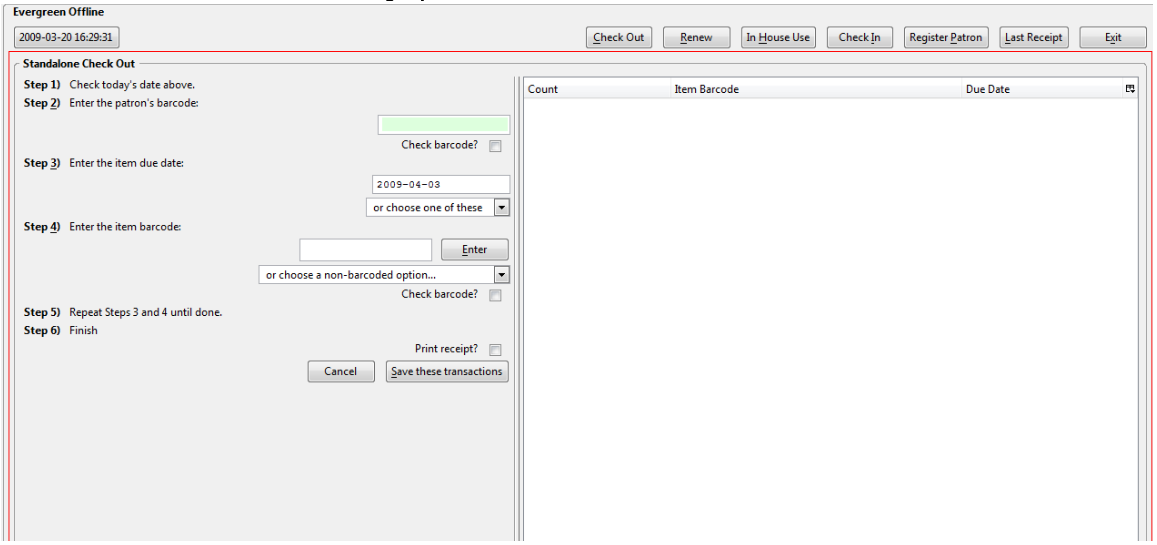


This will bring up the Evergreen Offline screen. The pink color is intended to identify that the workstation is operating off-line. In the upper left-hand corner you will see a running clock. This time stamps each transaction.

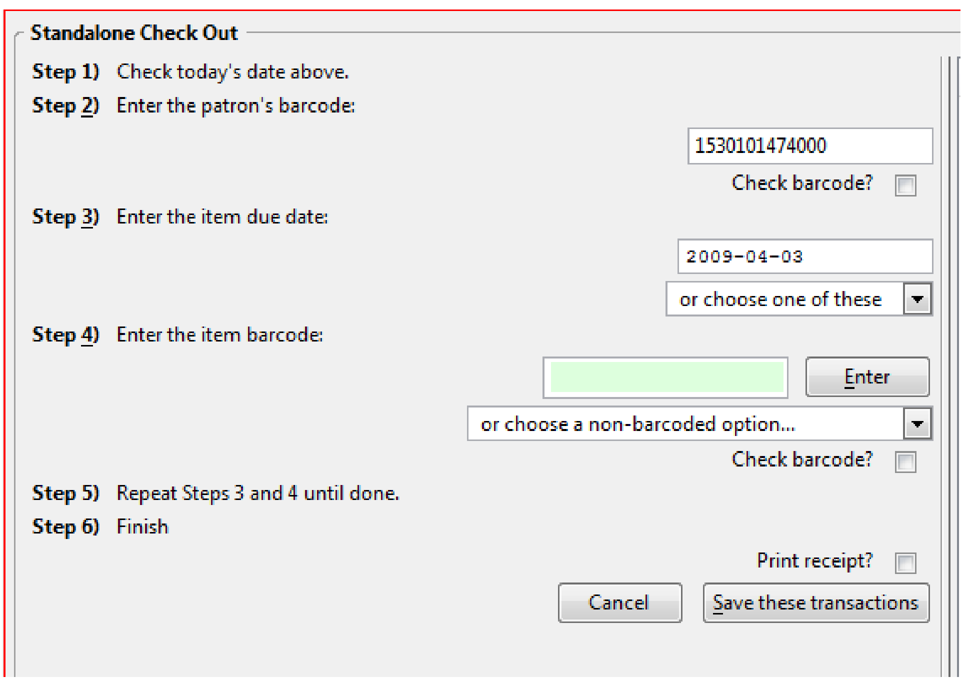


Notice the navigation toolbar buttons on the top row including *Check Out, Renew, In-House Use, Check In, Register Patron, Last Receipt,* and *Exit*.

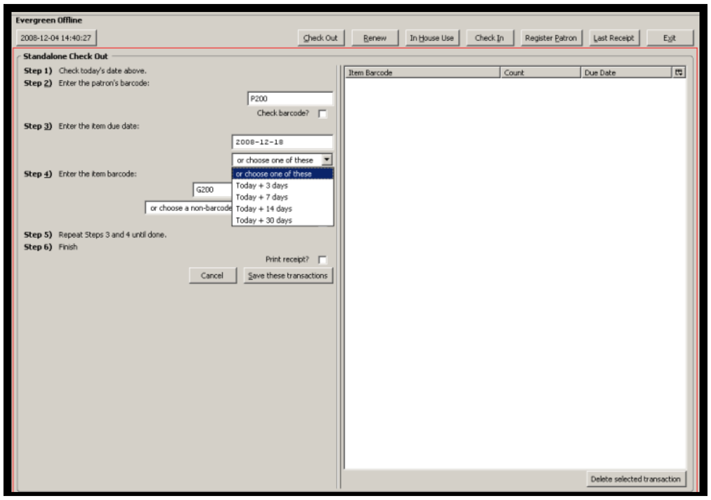
Click on Check Out. This will bring up the Offline Check Out screen.



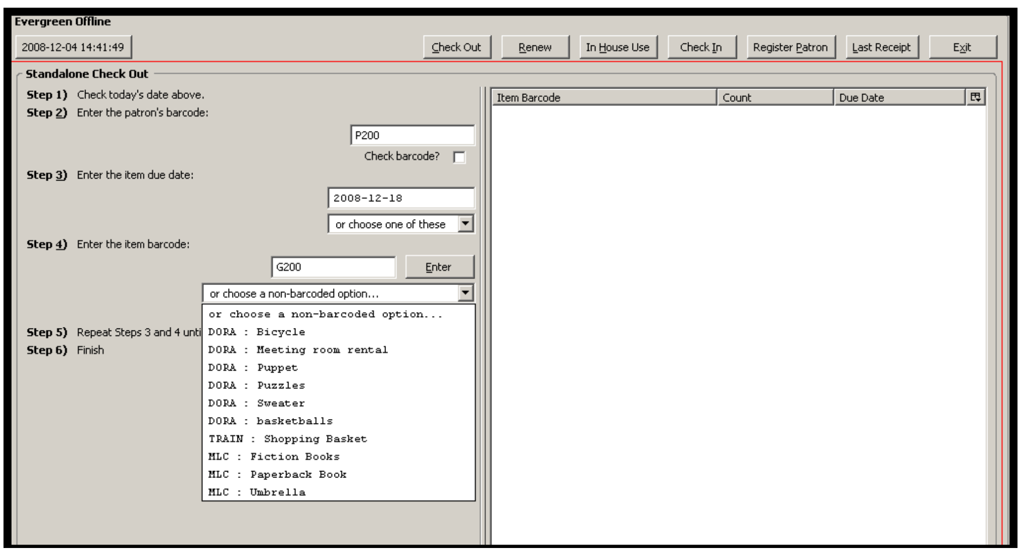
Enter the customer barcode in the box labeled Step2: “Enter the customer’s barcode”.



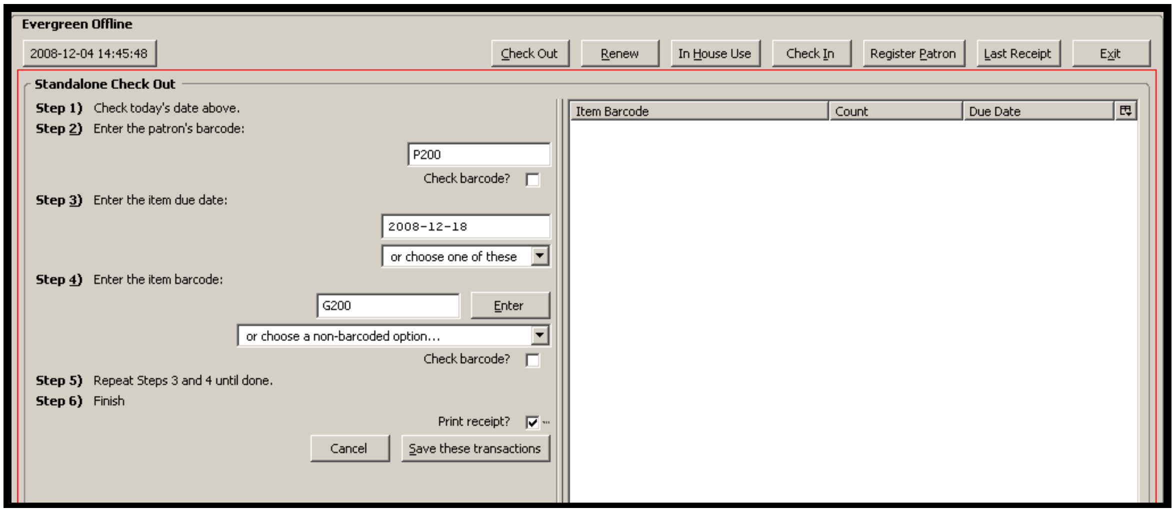
In Step 3, there is a default due date. You can also enter a custom due date or can select from the drop-down box. This allows you to set the due date for items that circulate at shorter or longer periods than your normal book circulation period (for example, DVDs)



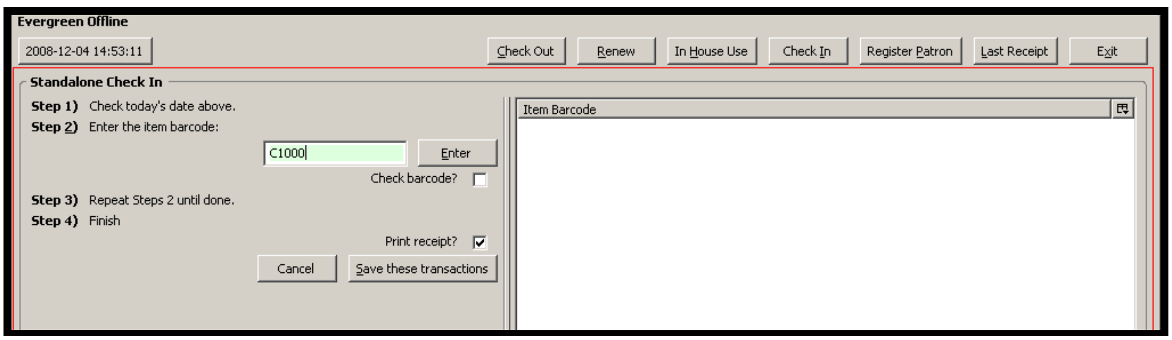
In Step 4, you enter the barcodes for the items to be checked out. Notice that you can also use the drop-down menu to choose a non-barcoded option. This is where you would enter things like paperbacks that circulate without barcodes.



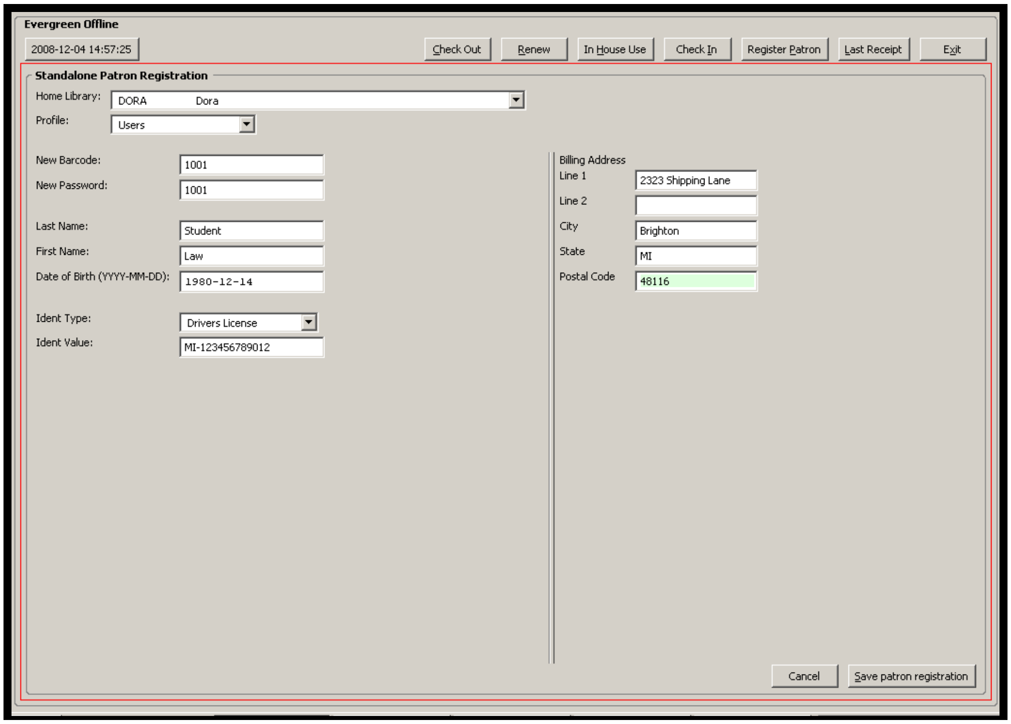
Click on Print receipt? to generate a check out a receipt for the customer and click on the button labeled Save these Transactions.



Checking in is accomplished in the same way, except that you use the Check In button to start the transaction.



You can register a customer by clicking on the button labeled Register Customer and entering all the information requested. Then click on the *Save Patron Registration* button in the lower right of the screen.



Click on Exit in the upper right and go to the next customer.

Uploading offline transactions

Once you are able to connect to the server, you need to upload the offline transactions. It is good practice to do this as soon as possible.
Once you can connect to the server, there are 3 steps to uploading offline transactions:

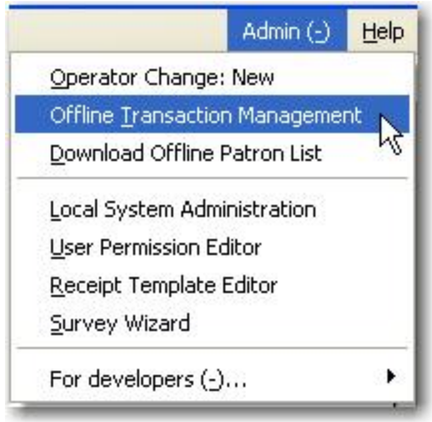
1. Creating a session
2. Uploading transactions
3. Processing transactions

Once the network has come back up, a local system admin must first create a session before uploading transactions. Then, staff can upload transactions from each of the workstations used in offline circ to that session. Once all of the branch workstations have uploaded their transactions to the session, the manager will process all the transactions from all the workstations at once.

NOTE: Circ Staff uploading transactions to the session does not put the transactions into the Evergreen database. The transactions will not be sent to the Evergreen database until the manager processes the session.

Create a Session

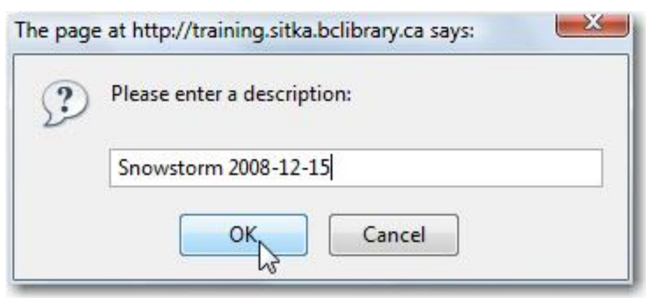
1. Log into Evergreen with a local system admin username and password.
2. From the menu bar, select ***Admin (-) > Offline Transaction Management***.



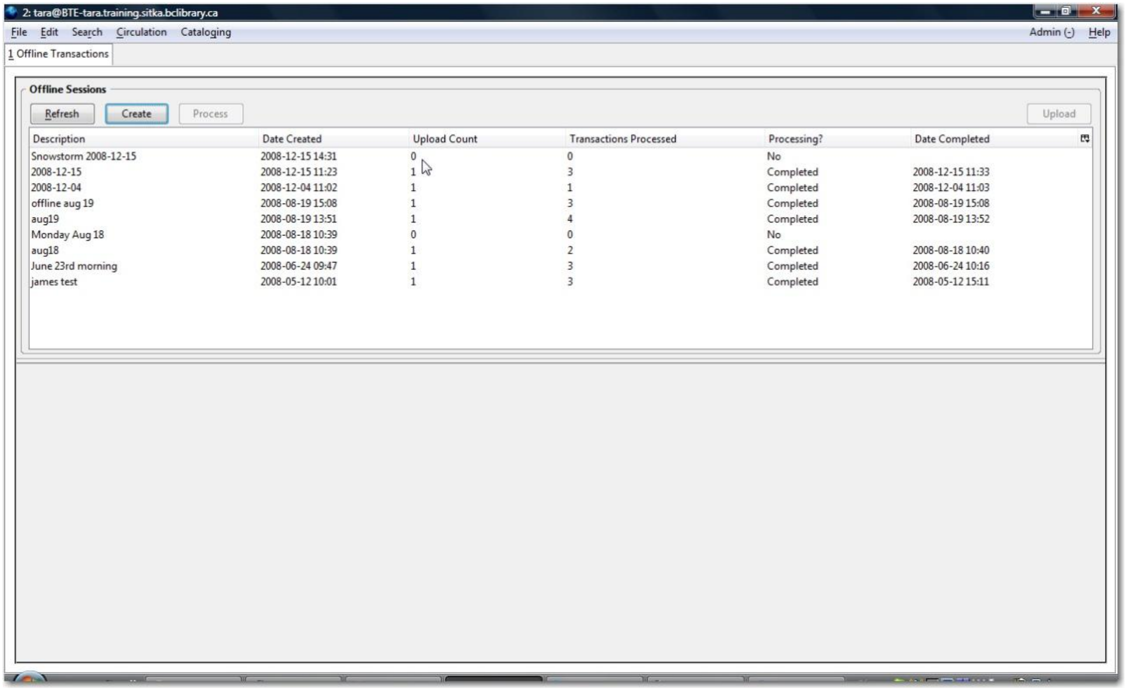
3. The *Offline Transactions* screen will open. Previously created sessions will be listed in the Offline Sessions section. Otherwise, the Offline Sessions section will be blank.

4. In the upper *Offline Sessions* section, click on the *Create* button to create a new session.

5. Enter a name for the session, like "Snowstorm 2008-12-15". Click *OK*.



6. In the Offline Sessions section, highlight the session you just created. An Uploaded Transactions section will appear in the bottom of the screen. Initially, this section will be empty.

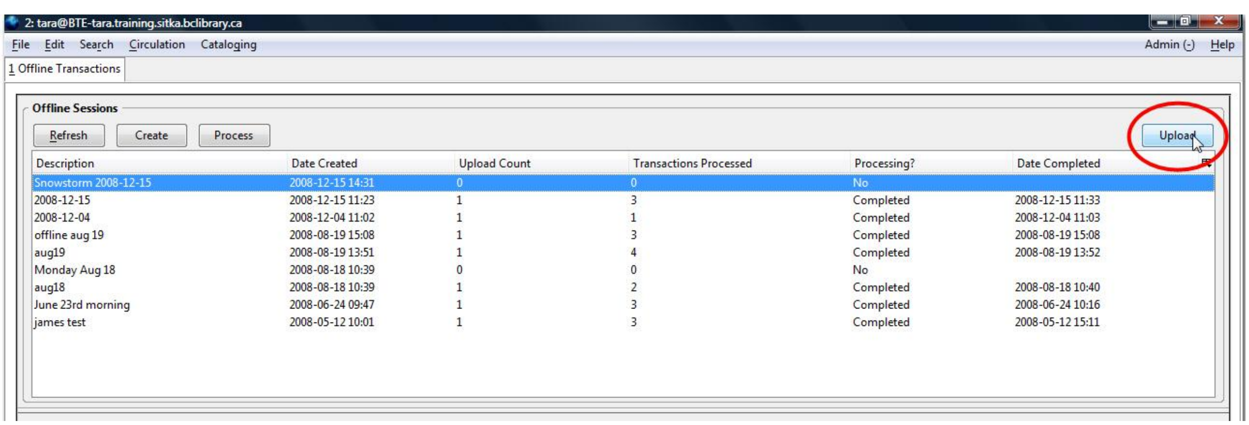


7. Inform library staff that the session has been created and what the session name is.

Upload Workstation Transactions to a Session

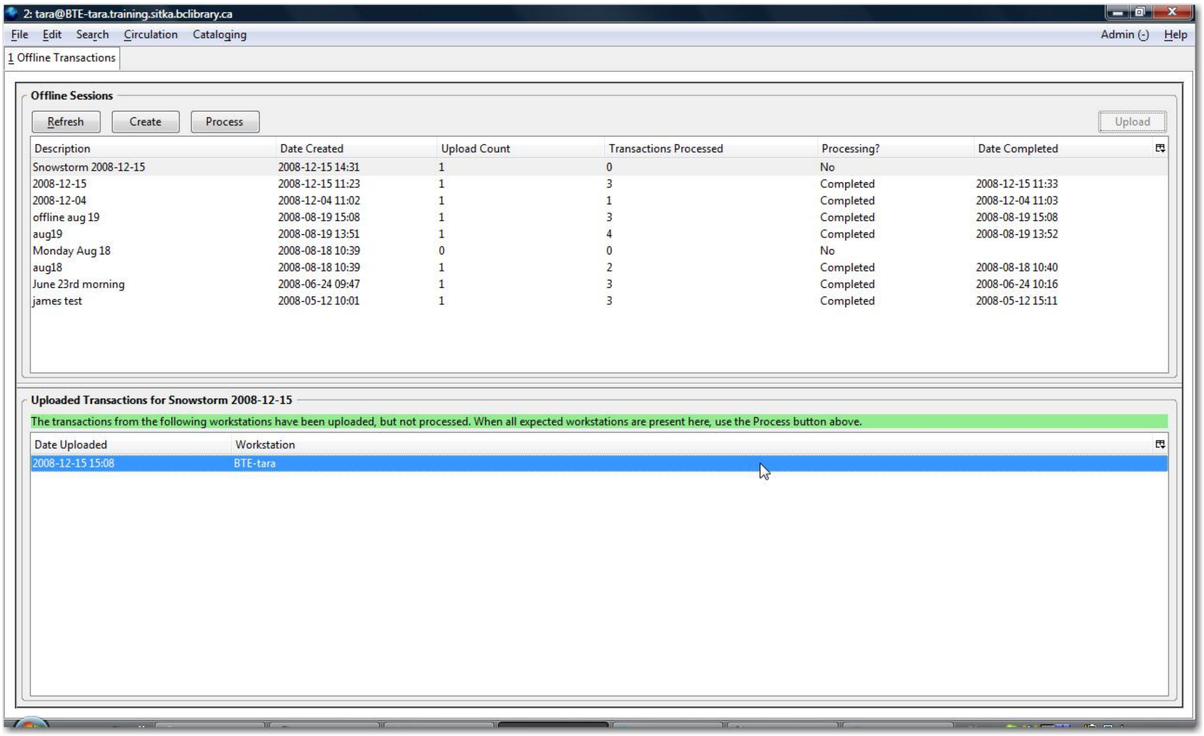
Wait until the local system admin has created a session and told you that it's ready for your upload. There may be several sessions shown on the *Offline Transaction Management* screen, so you'll need the name of the correct session from your local system admin.

1. Log into Evergreen with your normal username and password.
2. From the menu bar, select ***Admin (-) > Offline Transaction Management***.
3. The *Offline Transactions* screen will open. You should see at least one session in the *Offline Sessions* section. You will see old sessions listed there as well.
4. In the upper *Offline Sessions* section, highlight the correct session, and then click *Upload*.



NOTE: You will need to do this for each workstation you use for offline circulation. If your library has more than one workstation that is used for offline transactions you will see the other workstation sessions that have already been uploaded.

5. The Uploaded Transactions section should now list your workstation. You may need to click the *Refresh* button for it to appear. Also, in the Offline Sessions section, the value in the Upload Count column should have been increased by 1.

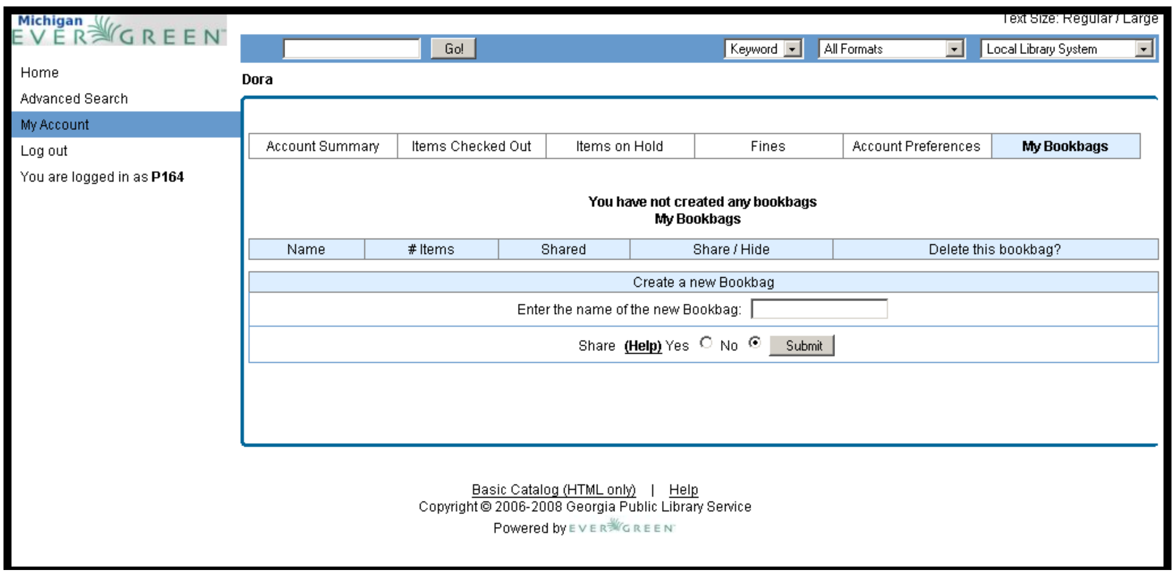


Let your local system admin know that your transactions have been uploaded to the session.

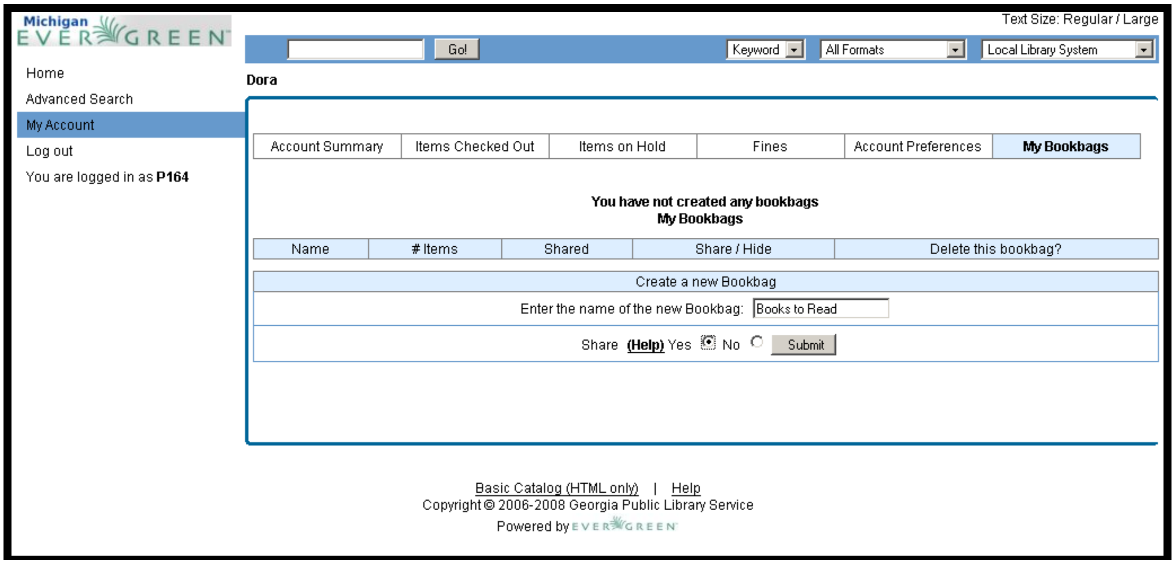
Appendix 5

My Bookbags

My Bookbags is a feature that allows the customer to save lists of books and other library materials. These lists can be private to the customer or can be shared with others via RSS. Customer bookbags are created and viewed through the OPEC via the customer account screen by selecting *My Bookbags*. Notice that the first time this screen is displayed by the customer, there will be a message: “You have not created any bookbags”.



Enter the name of the bookbag, click on whether to share (Yes or No) and
Click on *Submit*.



The first time a customer creates a bookbag, a privacy warning will appear as shown in Figure 139.

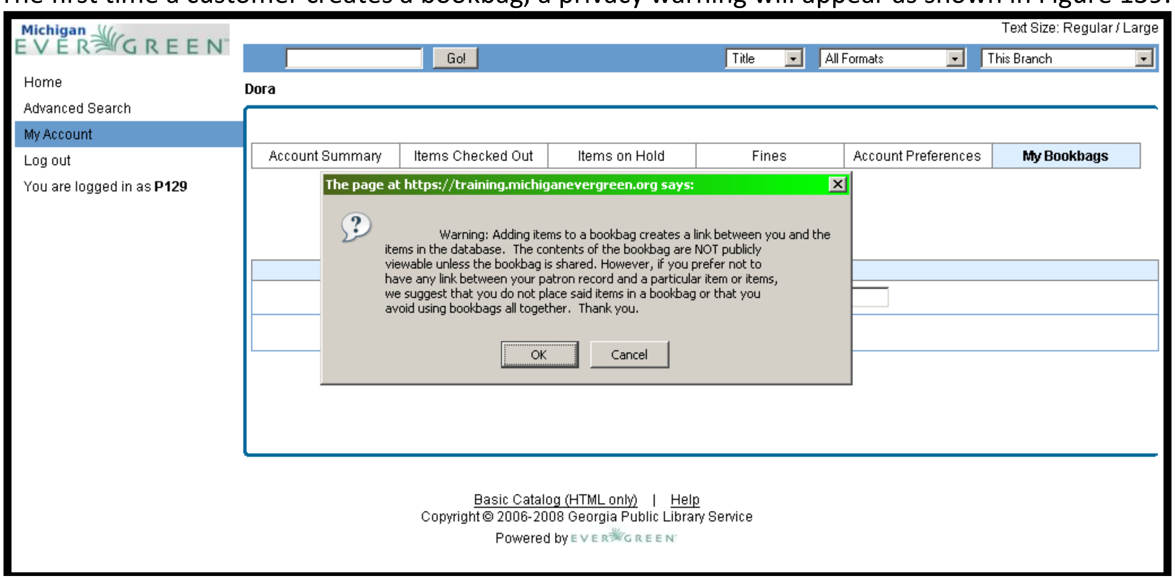
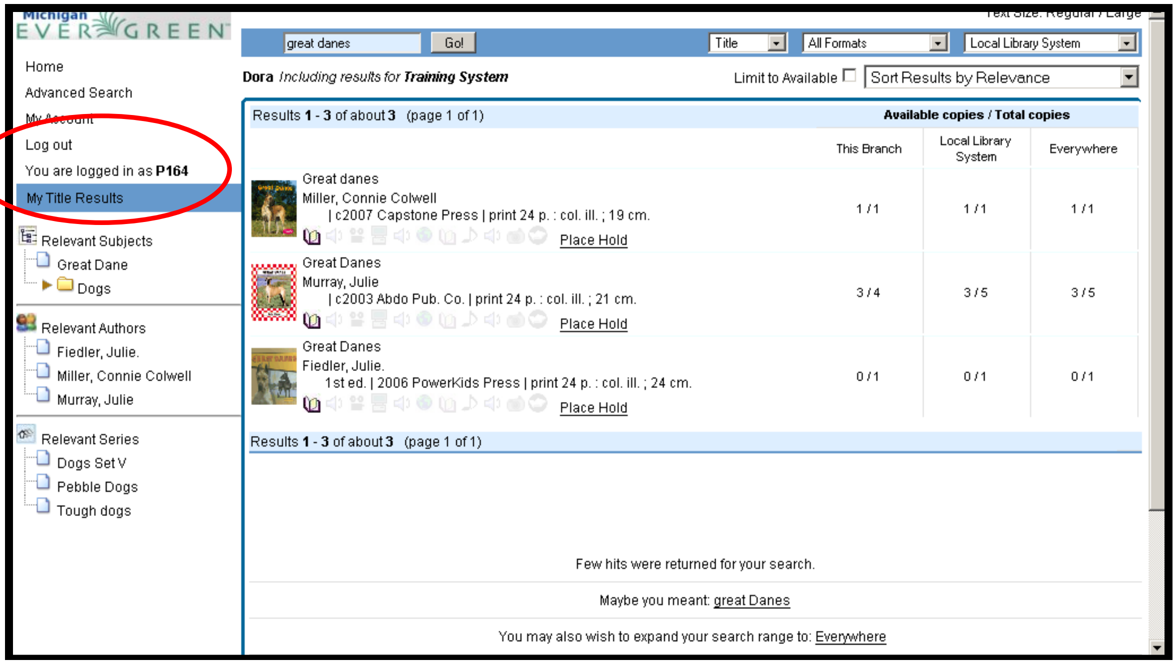
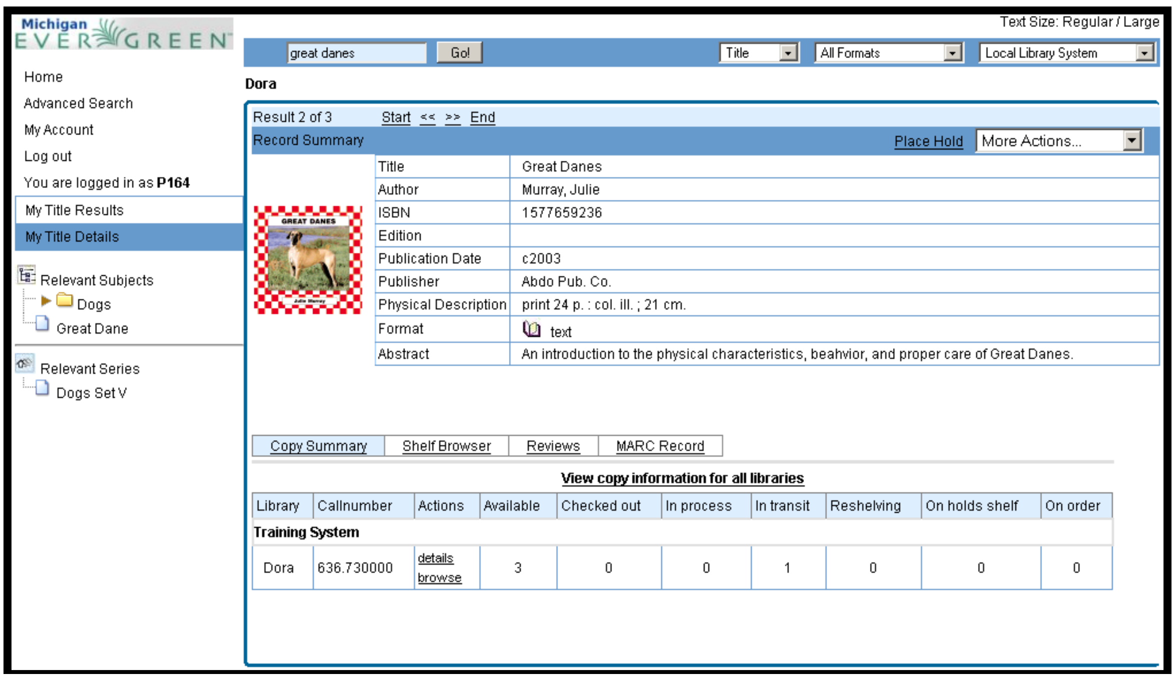


Figure 139 Privacy Warning Message

Click on *OK*.
The bookbag has been created.
The customer can immediately begin adding content to their bookbag after creating the first one in My Account. They can also return later and add content as long as they are logged in. The prompt will not appear unless the customer is logged in. There is a message to the left of the search screen if the customer is logged in.

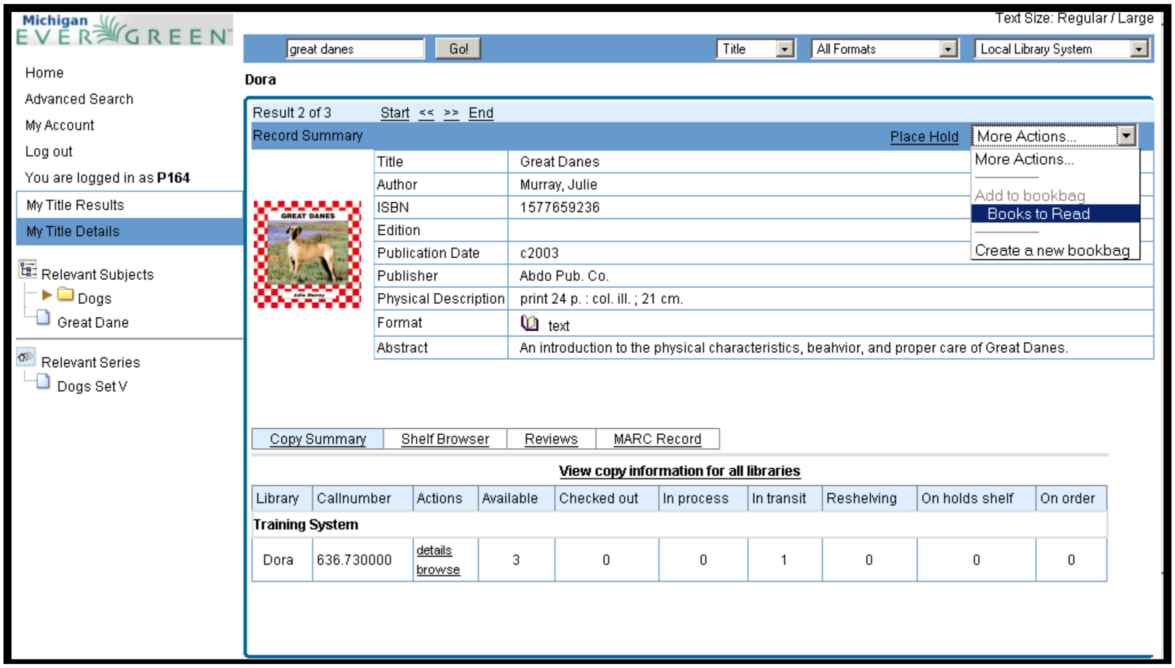


When a customer is logged in, there will be a drop-down box prompting to choose *More Actions* to the right of the selected record (next to the *Place Hold* link).

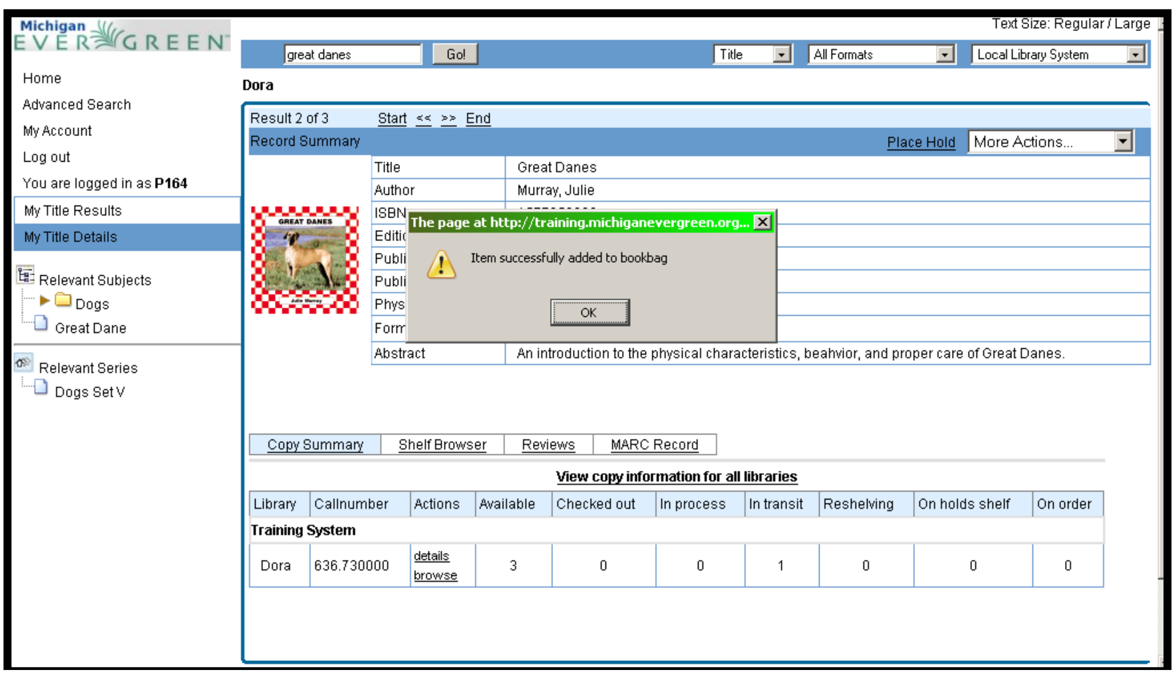


When the customer clicks on the *More Actions*, there will be two choices:

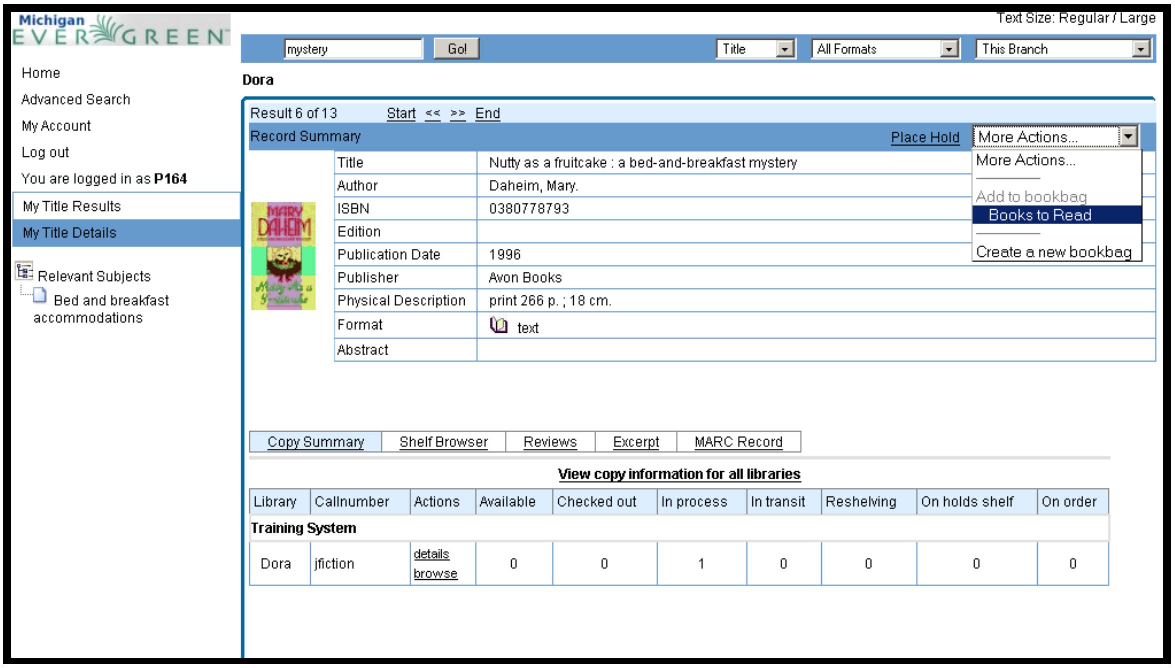
- add to any existing bookbags,
- Create a new bookbag.

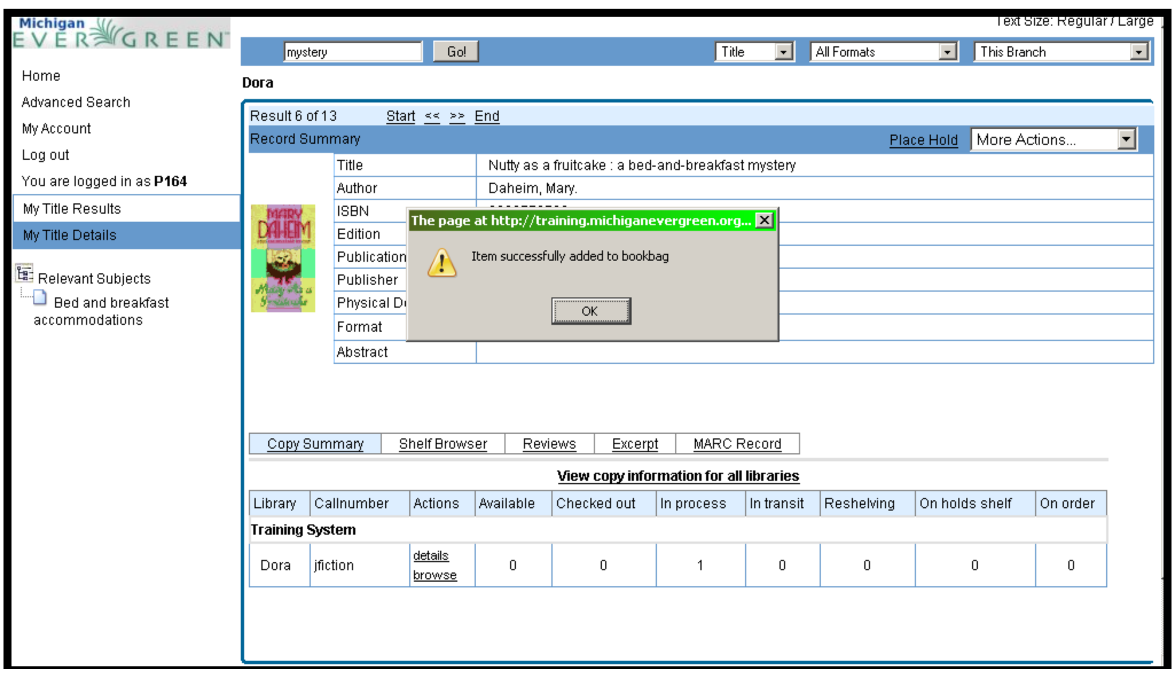


Once the customer chooses to either add the title to an existing bookbag or place the title in the new bookbag, a message will appear saying "Item successfully added to bookbag." The customer then clicks on *OK*.

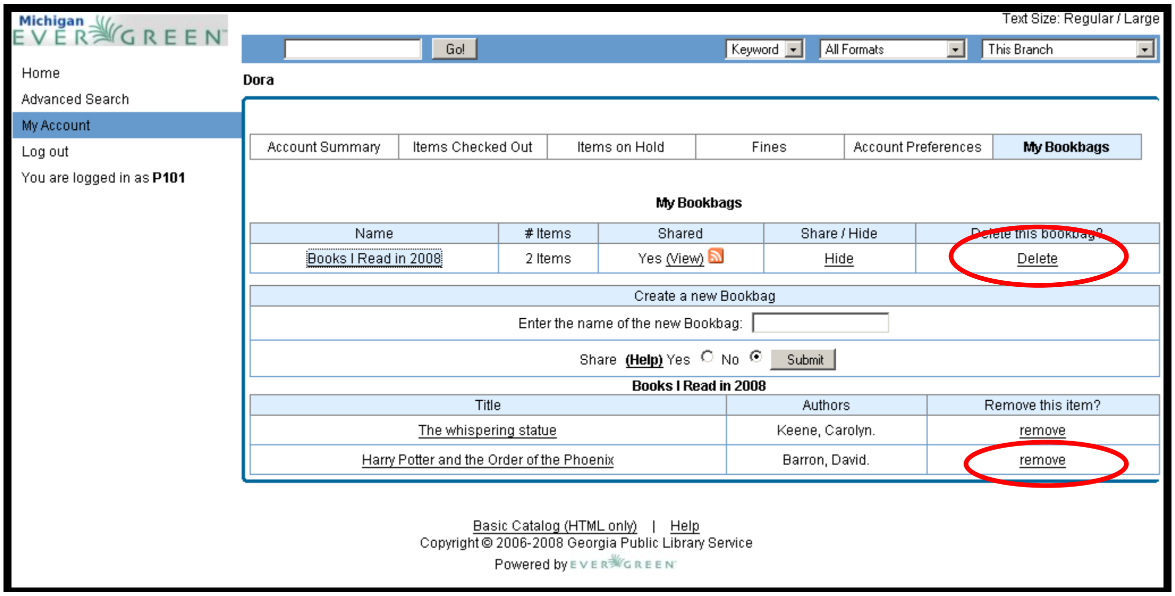


The customer can then execute additional searches and add titles to bookbags or choose to add more titles at a later time. A bookbag can be as big as the customer likes, and there are no limits on how many bookbags they can create.





The customer can review the contents of their bookbag at any time from My Account. Each bookbag is listed by name with the number of items, whether it is shared or not, and options are given to either show or hide the bookbag and to delete it. The show or hide options and the option to delete are exercised by clicking on the links for each.



The titles will remain in the bookbags until deleted by the customer. Deletions are done by clicking on the *remove* link next to each title in the bookbag. Bookbags themselves are also deleted from the My Account screen by clicking on the *Delete* link next to the book bag entry.

Appendix 6

Frequently Asked Questions

Buckets--Buckets provide a method of grouping items together for the purpose of making a change or changes to those records in a batch. For example, a collection of books that contain holiday recipes: in October, you'd like to collect those item records for those books, and make a couple of changes to them (like making the shelving location "display" and changing the loan period to "short"). In January, you'd like to take that same group of books and change them back to regular shelving locations and a normal loan period. When you can collect those items in a "bucket", you can make those kinds of changes quickly, without having to individually change each record.

Age-Protection--When a book is cataloged, it may be given an age protection of 3 months, which limits it to holds only by customers registered at its home library for the interval and then only to customers in the library system to which the owning library belongs for another 3 months. (Items set for 3 months are automatically set to 6 months at the end of 3 months unless unset manually.) Or, it may be given an age protection of 6 months, which limits it to customers registered in library system to which the owning library belongs. Evergreen will generate a message that turns down the hold if the customer is not eligible for some reason. Staff members can place holds on age-protected items that are owned by their own library for any customer from within the Evergreen staff client. You can see the age protection in two places: in the item attributes field in the staff client and in the item details area in the Catalog window. You must also look at the item entry date to see if the age protection has expired.

Claims Returned Count--Will claims return items come off a customer's account if the item is found? Yes and no. Yes--from the Customer Summary (on the left side of the page); this count reflects ACTIVE claims returned.
No--from the customer's record in the *Groups and Permissions* section. This reflects the number of times a customer has claimed that he has returned an item.
If a Claims Returned item is checked in, a message will appear telling you the item had been Claimed Returned, asking if you want to "force this action". Clicking Yes will check in the item. At that point (on the check-in screen) you'll want to investigate. Click on the item, go to *Actions for Selected Items*, and click *Show Last Few Circulations*. Click *Retrieve Last Patron*. In the customer's record, you'll see in the customer summary section (on the left side) that the claims returned is gone (or has dropped by 1).
In the customer record itself, going into Edit and Groups and Permissions page you'll still see the Claims Returned count there unchanged. At this point you can manually drop the count by one if you wish then *Finish* and *Save* the record.

Customer OPEC Messages--What does *"Fines Accruing"* mean in My Account? It means the item is still out, overdue and the fines are adding up.

Overdue Materials					
Title	Author	Checkout Date	Due Date	Date Returned	Balance Owed
Writing from within :		2009-03-18	2009-04-01	(fines accruing)	$0.20
The black-white test score gap	Jencks, Christopher.	2009-03-11	2009-03-13	(fines accruing)	$2.00
Pakistan The people	Black, Carolyn.	2009-03-11	2009-03-13	(fines accruing)	$2.00
The book of pressed flowers	Black, Penny.	2009-03-09	2009-03-22	LOST	$28.60

Are the circulation policies based on the owning library or the circulating library? --The circulation policies are all based on the circulating library. So, if an Anderson customer requests a book from Beaufort and then checks out that book from Anderson, then Anderson's circulation policies will be in effect. However, if that same Anderson customer travels to Beaufort and checks out the same book directly from a Beaufort branch, then Beaufort's circulation policies will be in effect.

Can we set age protection to 1 year if we want?--Yes, you can change the duration and range of protection. These are configurable. Also, our current protection rule of 3 months implies branch level protection for 3 months and then system (county system) level protection for an extra 3 months. So, you really end up with 6 months protection. The 6 month protection is to protect the item at the branch level for 6 full months.

Is there a way to place holds on multiple item(s) and group them together as in Sirsi's Blanket Hold?--This function would specify that once a hold is filled for one item all other items in this group would be taken off their hold request for that group, which is useful for summer reading requests when a student just wants to read one of any number of possible books. Evergreen does not have this functionality, and so far it's not planned for development.

Hold slips and transit slips print automatically. Is there a way to "turn off" transit slips so only hold slips are printed? --No, you cannot turn off transit slips without turning off hold slips. Transit, hold and hold-transit slips are all merged together. However, if you choose not to auto print the slips, you will be prompted to print the slip and you can choose whether or not to print a specific slip.

Do email notices go automatically to those with email addresses and print notices, therefore, go just to patrons without email addresses? -- Evergreen currently has hold and overdue notices. The holds notification preference that is available right now only allows for email or phone notifications. So, if the person has an email and allows email notifications, then they'll always get an email about their available holds. If they don't have an email or if they've selected phone as their preference, then a report can be run to indicate which users need a phone call about their holds. The phone option will eventually work with telephony once that is developed so the system can automatically call them. Having customers indicate their preference for receiving email or print notices is not planned but could be developed and integrated into a future events manager.

SC Lends Fines SC LENDS Libraries will keep all their own circulation fines and fee policies. The check-out library's fine schedule will apply to any item checked out through that library, regardless of where the item comes from. Fines collected will not be transferred between libraries. The price of lost items will be collected and transferred back to the home library. However, if lost item fees cannot be collected, it will be considered a cost of doing business, and no library will be charged for not being able to collect on an item.

SC Lends Customers Customers in good standing with their home library can borrow from the consortium. Customers above the fine or overdue limit within their home library system will be blocked from borrowing from all SC LENDS libraries regardless of the fine or overdue limits of the other library systems.

ILL SC Lends limitation ILL's are only allowed to be initiated by customers from within their own System's libraries.

"I already paid that bill last week! Evergreen keeps a history of paid bills that reaches as far back as the patron's history with us. Click the "history" button under summary at the top left to deal with this situation.

Appendix 7

CVS Files

CSV stands for Comma Separated Values, sometimes also called Comma Delimited. A CSV file is a specially formatted plain text file which stores spreadsheet or basic database-style information in a very simple format, with one record on each line, and each field within that record separated by a comma. Evergreen uses CSV files as a simple way to transfer information between programs, without worrying about special file types.

You can export information from the Evergreen staff client and import it into Excel or other programs compatible with CSV files. Excel will enable you create your own lists and manipulate them however you need.

The Export button is found in many Evergreen windows. For example, on the *Holds Shelf* window, at the bottom, there's a *Print* button and an *Export* button. If you just want to print out a list of what you see on screen, choose *Print*. But if you want to create your own list and work with it in Excel, choose *Export*. After choosing *Export*, you will see a window pop open that presents what looks like a very disordered-looking version of your list. This information has automatically been copied by the export function.

It needs to be transformed before it can be imported into excel. In this example, use Notepad to prepare the file for Excel. Open Notepad and in a blank page, press ***Ctrl+V*** (paste). All the data you just exported will be pasted into Notepad. Save the Notepad file where you can easily find it, with a file name you recognize. It should save as a*.txt* (text) file[8].

Open Microsoft Excel and **Click *File* > *Open***. Browse to where you saved your text file of exported data. In order for the Excel File Open command to you text file listed, change the *Files of Type* to *All Files (*.*).* Now you'll see your text file listed. Click on it and then click *Open*.

Excel recognizes that you are trying to read a text file and invokes the *Text Import Wizard*.

- In Step 1, leave the defaults as they appear and click *Next*.
- In Step 2, click to select *Comma* as a Delimiter. (This means that commas separate the individual pieces of information, which you want Excel to separate into columns.) There's probably a check mark beside *Tab*, you can leave that.
- Keep going with the defaults then click Finish.

Now your exported data is separated into columns and rows in Excel.

When the data to be displayed is too wide for the column it's in, Excel displays the contents of the cell as #######. If you see a cell displaying ####### instead of information, just widen the column.

Either click on the vertical line, separating the column headings, and drag it right or left (to expand or narrow the column), or double-click on the same vertical line, and the column will auto-expand to the width of the longest piece of data in the entire column.

If you are showing an item number or a patron number in your data, it will appear as something like 2.1019E+13 or 3.1019E+13.

Right click on the column header – That's the letter that is at the very top of the column. The whole column should highlight. Left click Format cells. The Number tab should be open. Under Category, click Number. Just to its right, find Decimal Places: click the down arrow under it shows 0. Click OK. You'll see that the numbers now look like Patron or Item Numbers.

[8] **Note: if you try to directly paste the output of evergreen into Excel, without first converting it into a text file, excel will be unable to display the data in individual cells.**